

McGRAW-HILL INDUSTRIAL ORGANIZATION
AND MANAGEMENT SERIES

L. O. MORROW, *Consulting Editor*

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***Conference Leadership
in Business and Industry***

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Conference Leadership in Business and Industry

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CONFERENCE LEADERSHIP IN
BUSINESS AND INDUSTRY

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THIS BOOK IS DEDICATED TO

YOU

THE READER

ONLY THROUGH YOUR UNDERSTANDING AND USE

CAN IT BE MADE TO LIVE AND HAVE MEANING

PREFACE

During the twenty-five years that conference leadership training has been given, comparatively little has been written about the actual, practical step-by-step procedures to be used. There is much literature on the broad philosophical and general aspects that contains the fundamentals upon which the step-by-step procedures are founded. As a result, most conference leadership training has been conducted from outlines prepared by the leaders. This book will, it is hoped, fill the need for a narrative treatment of the specific conference methods used in business conferences and in purely training conferences. In addition, it attempts to define the problems peculiar to the day-to-day business conference and, through clarification of existing misconceptions, to stimulate the use of conference leadership methods in handling them.

No attempt has been made to provide an over-all philosophical background treatment of conference leadership and conferences. By far the greater proportion of available works on conferences and conference leadership devote themselves almost exclusively to the more general philosophical phases of the subject and the conference setting rather than to the actual conference leadership procedure itself. Only such theoretical and background material as is essential to an understanding and appreciation of the conference process and the actual technique of conducting conferences has been included. It is hoped that this treatment of conference leadership will provide a matter-of-fact, down-to-earth, step-by-step guide that can be applied to the ordinary business conference as well as to conferences of a purely training nature.

The type of material and its arrangement reflect the methods used in presenting it. The methods of instruction are varied throughout leader training conferences to meet the needs of the

subject under discussion. Certain items are covered on a straight Informational basis followed by discussion, while others are handled on a Shaped Developmental or a Purely Developmental conference basis. To be consistent with the principles and procedures outlined in the book, the form and arrangement of the book itself have been specially devised and set up. True-false, completion, and matching tests have been provided and, wherever possible, flow diagrams summarizing the key ideas in the chapters so as to enable the reader to check on his understanding of the material presented. Suggested exercises and observations have also been devised so the reader may test and check his acceptance of the material. This permits the achievement of as thorough an appreciation of conference leading as is possible without the conference leadership practice sessions that are a part of an actual leader training conference.

Conference leadership training and, in turn, this book are susceptible to the same failing that is characteristic of any detailed treatment of a subject. The very fact that each part is subjected to detailed discussion and scrutiny tends to build up a feeling of complexity in the mind of the learner or reader. It is essential to keep in mind at all times the false impression of the forest that results from a detailed scrutiny of each of the trees. All conference leaders should be cautioned to absorb the material thoroughly, to complete proper planning for their conference, and then to avoid too conscious an effort to follow and check on each step and detail of the procedure as they attempt to use it. In fact, after having absorbed the procedure and prepared the conference material, the leader should depend upon his natural reactions and subconscious mind to carry him through. Unless the process is done in a natural, uninhibited manner, its very artificiality will defeat its purpose.

The author would like to pay tribute to the late Charles R. Allen, whose work as Superintendent of Training for the Emergency Fleet Corporation in the First World War and with the Federal Board of Vocational Education during subsequent years supplied many of the early fundamentals upon which present-day conference leadership techniques are based. The author is indebted to Norman W. Kingsley, Plant Employment Engineer,

American Telephone and Telegraph Company, without whose encouragement the writing of this book would probably never have been undertaken. Also, he wishes to express his appreciation for the assistance given by George F. Pieper, General Plant Training Supervisor, New England Telephone and Telegraph Company, in the preparation of the chapters on Discussion Control and Conference Settings.

EARLE S. HANNAFORD.

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CONFERENCE LEADERSHIP IN BUSINESS AND INDUSTRY

CHAPTER I

CONFERENCE LEADING AND ITS EVERYDAY BUSINESS APPLICATIONS

HUMAN RELATIONSHIPS AS THE BASIS FOR CONFERENCE LEADING

Before investigating and discussing the principles of conference leadership, it will be well worth while to review briefly some of the general human relationships and background upon which it is based. This will permit a better understanding and appreciation of the methods themselves.

The exchange of ideas and the formation of opinions and decisions through conversation is, without doubt, one of man's major distinguishing characteristics. It is directly related to the ability to reason, which sets him apart from the lower animals. Obviously, all our human contacts, whether of a social or business nature, are made through use of conversation. Meetings, group discussions, and conferences are based on the same general fundamental principles as apply when two people are conversing.

The fundamental principles used in conference leadership are merely special applications of the many things we already know and use in our everyday contacts with people. Actually, our main job will be to draw out of our experience the particular ideas and practices which apply to conference leading and review and arrange them with it in mind. Of necessity, we are all constant users and experimenters in practical psychology; the conscious study of it in terms of conference leading will produce all the tools that we will require.

Conference leadership is primarily a practical, everyday tool for use in day-to-day business conferences and contacts. When

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it is properly set up and a knowledge of the various methods and processes is obtained, its possible uses in business and industry by far outweigh and overshadow its uses on a purely training basis. Conferences have always existed and always will, for they are an inherent part of all business and industrial activity. Conferences will continue, regardless of whether we ever learn to make the tremendous savings in time, money, and wear and tear on our nervous systems which result from proper application of the principles of conference leadership.

IDENTICAL ASPECTS OF CONFERENCE LEADING AND HANDLING PEOPLE

Stripped of all its folderol and expressed in the simplest terms, the supervisor's, the superintendent's, and the executive's jobs all differ from the craftsman's in one simple, fundamental way. Instead of working with their hands and using tools and materials, they deal with people, sometimes as individuals, but much more often as groups. The higher up the line of organization one goes, the more evident it is that their work is accomplished through dealing with people, conveying to them an understanding of what is desired or is to be done, and obtaining their acceptance of it. No matter how we view it, the further up the line we get from actually doing the productive work, the more success and economy of time and effort in accomplishing our objective depend upon the ability to handle people. The ability to recognize the possible procedures open to us and to apply the practical rules of shaping people's thoughts and actions is indispensable.

Some people seem to have a natural facility for seizing upon or stumbling upon the practical, effective methods of guiding others along the lines which they wish them to go. Most of us, after years of experience, arrive at some workable ideas but are not absolutely sure as to the whys and wherefores of them. Conference leadership merely gathers together the practical experience of many people in this connection and, in so doing, shortens the trial-and-error period we must go through to make it possible for individuals and organizations consciously to apply proper procedures and eliminate those which are not effective.

The remark is often made that a supervisor's or an executive's job is, in many ways, chiefly made up of training others. This is obviously true of first-line supervisors or foremen where the main

objective is to make sure that the worker has an understanding of what he is to do, how he is to do it, and that he can actually do it. No concern is expressed as to whether the worker's voluntary acceptance of the method used is obtained, for acceptance of it as the proper economical method is a function of supervision and management. When supervisors and management representatives deal with each other, they have the added problem of getting voluntary acceptance as well as an understanding of what they wish to convey. The dealings of supervisors, superintendents, and executives with others on their own level, or above and below it, are founded on this one major principle. They must gain acceptance of their ideas in addition to giving the others concerned an understanding of them. In this way conferences differ from purely training sessions, as they must provide for both the expression of ideas and reactions as well as a means of arriving at an acceptable conclusion. Conference leadership provides the necessary principles and methods for gaining this double objective. It also provides the procedures for shaping and guiding people's thoughts so as to achieve an acceptable conclusion, as well as determining when to seek understanding only, or both understanding and acceptance. Conference leadership includes how to recognize the different stages in the process and the tests which will show the validity of the conclusion itself.

THE EVERYDAY BENEFITS AND USES OF CONFERENCE LEADERSHIP

One of the seldom recognized by-products of conference leadership training is its effect upon intelligent participation in a conference. When he has an understanding of the principles of conference leadership, an individual can participate as a conferee on a much more intelligent, cooperative basis. His knowledge of conference technique and various conference processes makes him unconsciously avoid many of the errors which often can make the day-to-day business conference such a wandering, indirect, and inconclusive affair. A knowledge of conference leadership enables him to avoid one of the most common involuntary failings of teachers, leaders, and supervisors, *viz.*, the inherent tendency to put one's best foot forward. We involuntarily concentrate on putting across an impression

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of our own smartness, cleverness, and outstanding ability. It is only natural to do this, but we should never forget the old saying that there are two kinds of supervisors and teachers, those who struggle to impress others with how good they are and those who teach or put across the knowledge or subject matter. No supervisor or teacher, for that matter, is paid to convey to others an understanding of his own superior capabilities. In fact, open parading of actual or fancied superiority cannot but inspire a feeling of inferiority. Conference leadership techniques are such as to compensate for this and, in so doing, provide a tool most vital to success as a supervisor.

Conference leadership is based upon and calls for the use of the same qualities as any other kind of leadership. It is a most vital and satisfying human experience, for we cannot live to ourselves and our lives must be a series of contacts and experiences with people. The prime requirement of conference leadership is that the leader must like and enjoy working with people, their ideas, and their reactions. Without this quality, success in handling people in conferences will be limited in the same way as in any other type of leadership or supervision.

The principles of conference leadership are particularly helpful for administrative, supervisory, and staff personnel because of the quirk in human nature that causes those with authority to confuse the operation of that authority with their own personal ability to handle people. The clergyman, teacher, and parent often think they are experts in human relations because they pass upon and judge those under their control. In the same way, the boss, because of his authority and his right to employ and discharge, to grant or not grant increases, to promote or demote, and to insist upon compliance, unconsciously assumes a sense of excellence in ability to handle people. The basic principles of shaping and guidance of people's thoughts and reactions as used in conference leadership contribute much to any supervisor's growth in ability to control the voluntary reactions of people.

MISCONCEPTIONS OF CONFERENCE LEADERSHIP

There has been some tendency in the past to consider conference leading a specially designed tool to be used in formal training conferences but not of much practical value in ordinary business conferences. This no doubt arose from the widespread

use of the purely developmental conference method in which time is not a factor and from the limited use of the shaped developmental and informational type of discussions. It was further aggravated by an incomplete understanding of the differences between conferences and the various other types of meetings and the failure to select the right type of meeting to achieve the objective sought.

In some respects the name "conference leadership" is a misnomer because the basic principles involved, when applied to their fullest extent, go much further than conducting conferences. They give a new insight into the underlying relationships between people and present valuable opportunities for the development and growth of the leader himself. The first stage in this development comes with the realization that, in conference leading as in all other leadership, the right to leadership carries with it the obligation of listening to those who are led. Leadership which does not carry with it voluntary acceptance by those who are led is never true leadership, since it is attained through domination.

One of the most difficult early lessons of the conference leader is to train himself to listen to the ideas and reactions of others without interjecting his own as a controlling factor. He learns to restrain his desire for self-assertion and to control and guide others through the compelling power of their own viewpoints so adjusted as to meet the group's and, in some cases, the leader's requirements. No leader or supervisor has even opened the vistas of true leadership until he realizes and understands the immense power and many uses of the various types of questions and the involuntary reactions stirred up in those who answer. Real leadership must be based upon an understanding and insight into how people react for it is simply the essence of getting along with others.

In itself, conference leadership is not the main objective of any business. Its use in other than purely training conferences must further the economical and efficient conduct of the business if it is to be justified. Conference leadership, when properly applied in day-to-day business conferences and contacts, is indispensable to gaining a thorough understanding of objectives, methods, and results.

CHAPTER II

MEETINGS AND CONFERENCES DEFINED

THE RANGE AND SCOPE OF HUMAN CONTACTS FOR BUSINESS AND SOCIAL PURPOSES

Since the human race appeared on the earth, there has of course been an endless chain of contacts or meetings between individuals and groups for the purpose of survival as well as for social progress in a recreational and a cultural way. With the gradual progress and accomplishments of civilization, survival for most of us is achieved through the competitive channels of the various crafts and professions, with by far the greater part of us depending upon some branch of business and industry.

Except in times of war, the tools and skills we require include more and more the ability to get along with our fellow beings and to gain their voluntary understanding and cooperation rather than to drive them with clubs and weapons to do our bidding. The art of conversation between individuals and that of group discussion have become increasingly important both in business and industry and in social life.

Through our study of conference leadership, we equip ourselves not only with conceptions and skills necessary to our productive careers but also with qualities that help to make all our social contacts and meetings more stimulating and beneficial.

Life is a continuing series of contacts, meetings, and gatherings with others. Before we can proceed with our study of conference leadership, we must find a means of classifying all the meetings and gatherings we experience as to basic types. Following this, we must determine in just what way conferences differ from other types of meetings. When we have achieved these two starting objectives we shall then be able to concentrate intelligently upon conference leadership.

POSSIBLE TYPES OF MEETINGS AND THEIR CLASSIFICATION

Personal contacts involving the exchange of ideas and the reaching of conclusions or decisions through conversation are

termed "meetings," in the broad sense of the word. For the purposes of our discussion, we shall consider only meetings involving groups of individuals, since contacts between two individuals are of a more limited and specialized nature. Although the same basic principles apply in both cases, we shall focus our attention primarily upon the methods and rules which govern meetings of groups of individuals.

The term "conference" has often been rather loosely used. We must determine just what a conference is and how it differs from other meetings before we can set up a procedure for conference leading. We must therefore first enumerate and consider the possible types of meetings and decide which ones are conferences. In order to arrive at a logical list of the possible types of meetings, we must first determine upon a basis for their classification. The most practical and useful basis for this classification is arrived at by designating them by their fundamental objective or purpose. Experience has shown that any type of meeting will fall under one of the following classifications or, in some cases, a combination of them. Sometimes what we call a meeting is made up of several parts, or it may so change its character and complexion during its course that it is a combination of two or more meeting types. Considering meetings according to the basic types it is possible to have, we can arrange them in a sequence of normal progression and development if we decide upon a standard for comparison. The standard that we shall use is the extent to which one man controls the decision reached by the group.

TYPES OF MEETINGS

Purpose	Name
1. To tell the group something.....	Instruction
2. To get an expression of opinion.....	Opinions requested
3. To develop some idea or purpose for the group.....	Informational
4. To have the group develop a procedure to be followed	Developmental
5. To reconcile conflicting interests (not opinions).....	Reconciliation
6. To achieve a general, nonspecific purpose—no single objective for the group.....	Nonspecific

The outstanding thing that we notice when we consider the types of meetings and Fig. 1, which shows them graphically, is that in Type 1 one man is in control, whereas in Type 6 no one is in control of the group. In Types 2, 3, and 4, there is a com-

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bination of control as to the decision reached, since the group does contribute something to the determination of a decision in each of them. The flow is practically all one way in Type 2 where opinions are obtained but the decision is made by the group leader or the authority. In Types 5 and 6 the group is in control, since it determines the procedure to follow. In Type 6, it must be borne in mind that the group as a whole has only a vague over-all objective and in some cases none whatever.

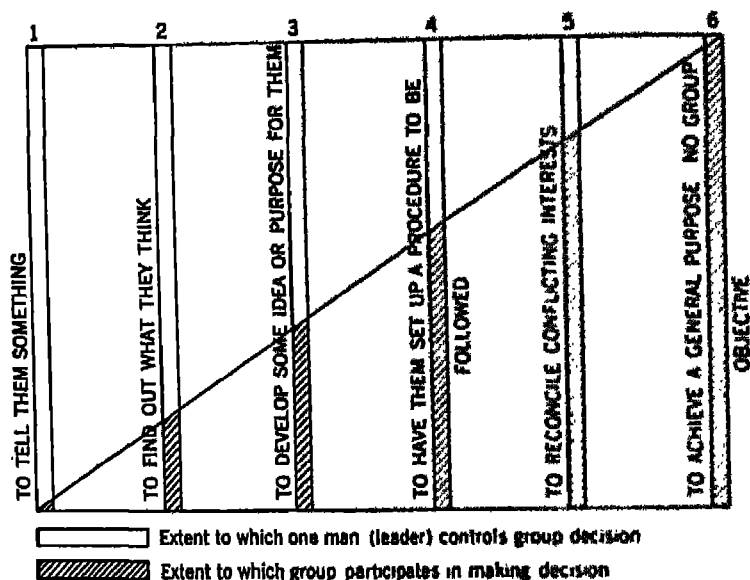


FIG. 1.

POSSIBLE TYPES OF MEETINGS ILLUSTRATED

Let us consider a brief illustration of each of the types of meetings in order that we may define them more clearly. Suppose that the superintendent called all his staff into his office and made the flat statement that, starting the first of the week, the office hours would be changed from eight until five to nine until six. It is obvious that the group had nothing to say with respect to the decision nor were their opinions asked. They were merely told what to do.

Let us carry the supposed case a little further. The boss, or authority, might have called his supervisors into his office and,

instead of merely stating what he wanted done, asked each one for his opinion on making such a change in the working hours. In this case each one would have contributed his opinion and then the boss or authority would have made up his mind as to what he wanted done and issued the order. The interchange would be all one way and the group would not control the final decision. A combination of one-man and group control would exist in spite of the fact that the group's only participation in the decision was one of contribution of ideas.

In still another case, the superintendent might have called the supervisory group together and, through group discussion, developed for them the conclusion that the office hours should be changed. This type of meeting would primarily be informational but would provide a much greater degree of group participation, even though in Type 3 meetings the balance of control is with the group leader.

To carry our theoretical case still further, we might have an instance in which the superintendent called his staff together, presenting the problem and guiding the discussion but allowing the group to set up the procedure to be followed. This is a Type 4 meeting; since the decision is developed by the group, control has passed entirely to it, although the actual conduct of the discussion is a function of the group leader.

Under wartime conditions the superintendents or department heads might have to meet in order to stagger the working hours of the various groups so as to lighten the peak-load burden on transportation systems. Although the general manager or ranking authority might act as group leader, the primary function of the meeting would be one of correlation of conflicting interests in such a manner as to meet an over-all objective. Another excellent illustration of a Type 5 meeting is a peace conference in which none of the parties will be completely satisfied since no over-all 100 per cent group acceptance can be obtained.

There are many illustrations of Type 6 meetings. A group of employees go on a picnic as a matter of general recreation. During the picnic, small groups pursue different recreations and the over-all objective is of a rather loose and vague type. Neither group control nor one-man control is very much in evidence. Other examples of Type 6 meetings are the fortuitous gathering of commuters on a homeward-bound train, and a group which

has gathered at a traffic light waiting to cross the street when it changes.

WHAT CONSTITUTES A CONFERENCE

Before exploring the subject of meetings further, we should try to pin down and define exactly what we mean by the word "conference" and fit it into the general scheme of meetings. This will give us the right perspective with respect to conferences and will enable us to determine what type of meeting should be used for a particular purpose or objective and also the method of planning and conducting it.

Conferences have always existed; they were not the invention or development of any particular individual or group. In our attempts to systematize and arrange our ideas about them, we should bear in mind that we are merely rearranging our ideas with respect to something that has always existed and always will. Whether or not we succeed in so orienting ourselves as to enable us to set up a method of procedure for conducting conferences in a more orderly, economical, and understanding way, conferences will always be with us. It will not be possible for us to change a single one of the basic, inherent psychological reactions or motives which make up human nature. Conference leadership merely enables us to suit the methods used to human nature. Our chief objective is to consider conferences from a business and training standpoint.

In a business, as in all other human contacts, very little could be accomplished without what we call "conferences." This is due mainly to the fact that routine practices and instructions can never be developed to the point where they will cover all situations without fail. Owing to the human element, routine practices would eventually fail and a decision would be required. Decision can only be made by authority. Three ways are open for authority to arrive at a decision.

1. The boss can make a decision on his own judgment, knowledge, and experience.
2. He can secure the aid and opinions of others, still reserving the right to make the decision himself.
3. He can delegate the decision to a group.

The third procedure is a comparatively recent one in industry as its use has become widespread only during the last fifty years.

It reflects the parallel development in business and industry of the same basic principles that evolved in government and social consciousness. The delegation of authority to groups, both in government and in industry, was the first step toward what we call "democracy" which distributes control among the responsible parties in a venture.

Referring to the six types of meetings that we have discussed, we find that the first two channels which authority may use to arrive at a decision are identical with the first two types of meetings listed, while the third in a general way embraces all the other types of meetings with the exception of Type 6, which has no definite purpose or objective and which does not play a part in the conduct of a business.

Webster, in his all-encompassing knowledge, defines a conference as a meeting for an interchange of opinions. Recognizing the fact that opinions are formed as the result of our thoughts and reactions, a more complete definition of a conference would be: *A conference is an oral interchange of thoughts and reactions.* We may test and define the scope of our new-found definition by reviewing and classifying the following list as to type of meeting and whether or not each is a conference.

	Type of meeting	Conference
a. You signal for a left turn; a traffic cop motions you on.	1	No
b. A board of directors meets to decide upon a proposed change in policy.....	4	Yes
c. Vocational instructor training group.....	3	Yes
d. A radio news commentator.....	1	No
e. Meeting to set up a plan to handle a business emergency.....	4	Yes
f. Meeting of management and union representatives..	5	Yes

In the broad sense, a conference does not have to result in a decision, nor is authority to place the decision in effect a necessary attribute of a conference. As a matter of information and to summarize the conclusions we have reached, let us list and classify the six types of meetings as to whether they are conferences.

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Type of meeting	Conference	Remarks
1	No	One man controls decision or conclusion since it is not based on interchange of thoughts and reactions—one way
2	No	Group participates only slightly in conclusion and there is no real interchange of thoughts and reactions
3	Yes	Group participates in conclusion and interchange is greatly increased. One-man control still predominates
4	Yes	Group participates in conclusion and interchange is very high. Group control predominates
5	Yes	Group is in control and there is high interchange
6	No	No specific group purpose

From our classification of the six types of meetings, we see that only three of them are really conferences. Type 3, the Informational meeting, Type 4, the Developmental meeting, and Type 5, the Reconciliation meeting are all conferences. It is interesting to note that all the conference types of meetings are subdivisions of the third and newest of the three ways in which authority may arrive at a decision, that of delegation of the decision to a group. Thus, the conference is a truly American institution and is characteristic of our way of life. It is not surprising, therefore, to hear businessmen from other countries remark upon the surprisingly large use of the conference in American business and industry.

RELATION BETWEEN GROUP PARTICIPATION AND GROUP ACCEPTANCE

We must not overlook the fact that all the five types of meetings with which we are concerned have a definite place in business and industry and that it is important to know when and how each should be used. The differentiation between the first five types of meetings and the sixth is that all the first five have one thing in common—to get the same viewpoint effective. The expectancy of group acceptance varies with the part that the group plays in determining the conclusion or decision reached. In Fig. 2, the expectancy of group acceptance is shown by the dotted line; it is highest for Type 4 meetings where the group

sets up the procedure to be followed and the leader's main function is assisting and guiding the group to a decision.

The expectancy of acceptance attainable in each of the five types of meetings is most important, for it is the main item about which the selection of the type of meeting to suit the purpose sought centers. The degree of acceptance which may logically be expected from each type of meeting, as shown in Fig. 2, is based upon the extent to which each type of meeting provides

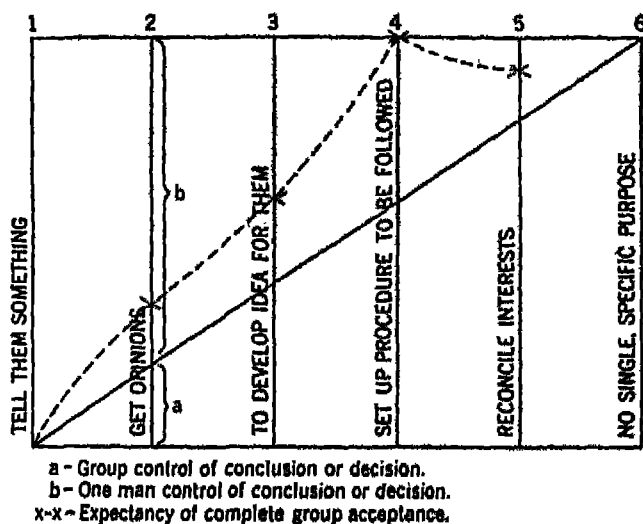


FIG. 2.

for checking the acceptance obtained. Thus, in Type 1 no check is made of acceptance while in Type 2 a slight indication of acceptance is obtained through seeking opinions. In Type 3, which is the first of the conference-type meetings, some actual check of acceptance is made, while in Type 4, where the group sets up the procedure and determines the conclusion, the expectancy of acceptance is 100 per cent. In Type 5 the expectancy of acceptance decreases, primarily because of the compromise type of adjustment which is inherent in reconciling differences. As an illustration, in negotiations between management and union representatives an agreement must be reached if possible. Although compromises are effected, acceptance by both parties in the sense that they really unreservedly believe the conclusion

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to be wholly acceptable from their standpoint is seldom reached. This is also true in peace conferences, where none of the participants will be really satisfied unless all his objectives and aims are realized without compromise.

As pointed out in Chap. I, the distinguishing feature of the conference as opposed to other types of meetings is its provision for obtaining group acceptance of the decision or conclusion. All types of meetings have an expectancy of 100 per cent understanding but only conferences provide for the expression of reactions so as to obtain acceptance as well. Figure 2 shows that the expectancy of acceptance does not go above 50 per cent until it reaches the first conference-type meeting, Type 3, the Informational meeting. Acceptance provides for the voluntary cooperation which is characteristic of copartnership in a venture and carries with it all the psychological benefits which are not present when we merely obey without having had the opportunity to gain a hearing of our own reactions. The mere privilege of expressing our views, having our questions answered, and having reasons pro and con discussed calls for the cooperation which can only be given when we believe in what we are doing.

The training conference which gives a foreman his job training methods is a good illustration of a Type 3 meeting and the supervisory methods training conference is an example of the Type 4 meeting. In both of these there is *an oral interchange of thoughts and reactions* which has as its objective obtaining *group acceptance of the viewpoint or conclusion reached*. We have therefore broadened our original definition of a conference to include group acceptance of a viewpoint or conclusion. Note that it still does not include the authority to place into effect the decision reached. Thus our definition of a conference is now as follows: *a conference is a meeting for an oral interchange of thoughts and reactions in order to get group acceptance of a viewpoint or conclusion.*

ADJUSTMENT OF LEADER'S FUNCTIONS TO TYPE OF MEETING

Each type of meeting calls for a particular method of handling by the group leader. Someone must be designated as the leader if a meeting is to achieve its purpose. Otherwise, some member of the group must take over the leader's function or the meeting becomes aimless, uneconomical in its use of time, and, in many cases, futile and inconclusive. We are of course limiting our

discussion to the first five types of meetings in which the general purpose is to get understanding and acceptance of a particular viewpoint.

In addition to determining the type of meeting and the function of the leader, the purpose also indicates the degree of group participation which is desired and through it, the method of handling to be used by the leader. It should be borne in mind that, if maximum acceptance and carry-over with the group are desired, maximum group participation is necessary.

Some meetings change their type as particular items are brought up for consideration and conclusions reached with respect to each of them. Furthermore, certain meetings are actually a combination of one or more of the standard types. From this it is clear that the term "meeting" itself has two or three usages. We have used it here to designate a gathering which extends over some particular period of time and during which several items are brought up for discussion. In addition, we have used the words "type of meeting" to indicate the varying types of handling which might be given to each of the component parts of the over-all meeting. It is not at all unusual for the members of a group to experience several types of meetings at one sitting, providing the group leader is aware of the need for adjusting the type of meeting to the purpose sought. The leader might also be the possessor of the necessary authority and wish to issue orders in connection with a particular subject. In a business conference, he might use this as a means of setting up the ground rules for the discussions which would follow. On certain items he might wish merely to get opinions before reaching his own decision while on others it might be desirable to allow the group to develop and determine the procedure to be followed.

We must at all times be sure to use the term "meeting" carefully and define how we are using it since, when used in the over-all sense, there may be little or no significance other than to indicate that there was a gathering.

When the purpose of the meeting results in the choice of a Type 3, 4, or 5 meeting, the part that the leader plays in determining the conclusion varies and decreases as we go from Type 3 to 5. As a result, his function is many times purely one of guiding and shaping the group discussion so as to reach an accepted conclusion.

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Several illustrations of the relationship between purpose, type of meeting, and leader's function are shown below:

Nature of gathering	Type	Purpose	Leader's function
1. High-school class session.	1	Instruction	Instruction
2. Disarmament or peace conference.	5	Reconciliation	Guidance and shaping of discussion
3. Leader training conferences.	3 and 4	Informational and developmental	Authority, shaping, and guidance
4. Lecture at engineering society....	1	Instruction	Instruction
5. Meeting of management representatives with union.	5	Reconciliation	Guidance and shaping of discussion

WHY MEETINGS AND CONFERENCES SOMETIMES FAIL

With very little thought, all of us can recollect many meetings we have attended which were improperly handled. This is particularly true of many of the day-to-day business conferences in which a group of representatives of different departments get together to reach a conclusion and obtain group acceptance of it. Often failures are the result of a lack of knowledge of applied conference leadership, but many flop because of

1. Not selecting the proper type of meeting for the purpose.
2. Not selecting the right method of handling for the type of meeting.
3. Not having had group participation.
4. Not summing up or crystallizing the group conclusion.

Not selecting the proper type of meeting for the purpose sought leads to many ineffective meetings and conferences. It is not difficult to recall instances in which the leader held a discussion in such a manner as to give the impression that the group was forming the conclusion which was to be followed, and then summed up the conference by telling them what had to be done. In other words, a Type 3 or 4 meeting of the conference type was used when a Type 1 meeting was indicated. One of the most unfortunate mistakes is the use of a Type 3 conference procedure when a Type 5 for the reconciliation of differences

should be used. When conflicting interests must be reconciled, it is practically impossible to have the group develop a conclusion or procedure and to attempt to get complete acceptance by expecting them to agree that it fulfills all their objectives.

Failure to use the correct leadership methods and technique for handling the type of meeting chosen usually results in confusion on the part of the group as to what is expected of them in the way of participation and in determining the conclusion. The results of mistakes of this type will be more apparent after leadership methods have been described and discussed.

Lack of attention to Items 3 and 4 gives rise to situations in which group members later take exception to conclusions reached at the conference. How many times have you had members of a conference group call and say, "I have just thought the matter over and I don't agree with what we decided to do," or, "What was it we did decide to do at the conference?" Group participation is essential to group acceptance, and summing up and crystallizing the conclusion reached are necessary to understanding. These four items are simple but highly important. No matter how skilled a leader may be if he does not select the right type of meeting he is lost; on the other hand, a conference leader with poor conference leading technique can get by if he makes the proper selection.

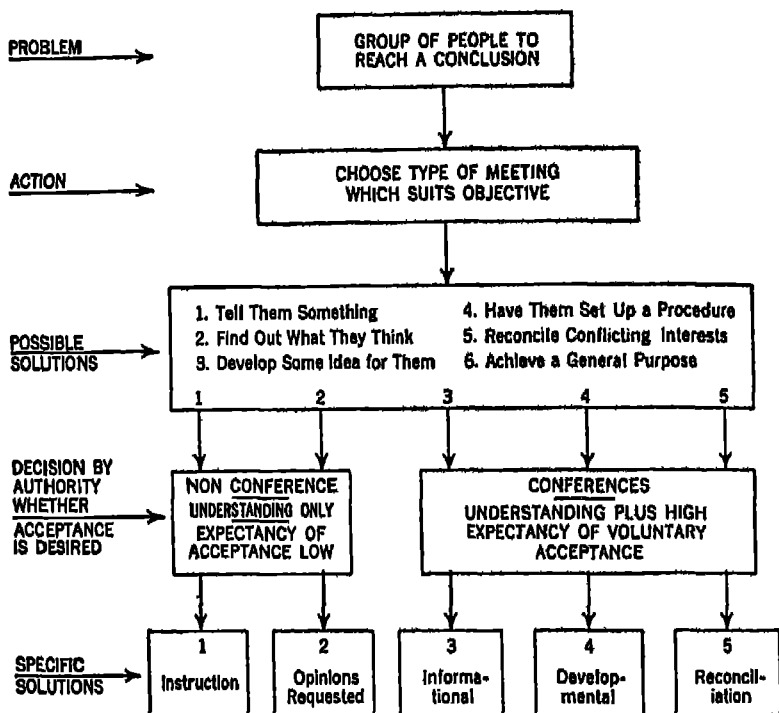
INDEX TO
DIAGRAM

FIG. 8.—Flow diagram summarizing Chap. II.

TRUE-FALSE QUIZ

- | | True | False |
|---|-------|-------|
| 1. The same fundamental conceptions do not apply to a conversation between two people as to a meeting of a group. | _____ | _____ |
| 2. All meetings consist of personal contacts resulting in the exchange of ideas through conversation. | _____ | _____ |
| 3. All meetings can be classified under one of six basic types or a combination of them. | _____ | _____ |
| 4. One man controls the decision in all six types of meetings. | _____ | _____ |
| 5. The group's function in any meeting is to assist the leader to reach a decision. | _____ | _____ |
| 6. Type 1 meeting: A top sergeant assigns the duties for the day. | _____ | _____ |
| 7. Type 2 meeting: A man appears at a draft-board hearing upon his appeal of a decision. | _____ | _____ |
| 8. Type 3 meeting: Meeting of a board of directors to set up new policies. | _____ | _____ |

	True	False
9. Type 4 meeting: A lodge picnic.	—	—
10. Type 5 meeting: A boy scout leader teaching handicrafts.	—	—
11. Type 6 meeting: War Labor Board hearing of a case between labor and management.	—	—
12. There are only two ways for a boss to arrive at a decision.	—	—
13. A conference is an oral interchange of thoughts and reactions.	—	—
14. Types 1, 2, and 6 meetings are not conferences because reactions are not expressed.	—	—
15. A conference must arrive at a decision and have authority to place it in effect.	—	—
16. The degree to which one man (the leader) controls the decision reached in a meeting decreases progressively as we go from a Type 1 meeting through Type 6.	—	—
17. Group participation in the conclusion decreases as we progress from a Type 1 meeting through Type 6.	—	—
18. Group acceptance of the conclusion is greatest in a Type 6 meeting.	—	—
19. Group acceptance of a conclusion depends directly upon the degree to which the group controls the decision reached.	—	—
20. 100 per cent acceptance and 100 per cent understanding are the same, for understanding demands acceptance.	—	—
21. A more complete definition of a conference is "A conference is a meeting for an oral interchange of thoughts and reactions in order to get group acceptance of a viewpoint or conclusion."	—	—
22. There must be a leader if a meeting is to be effective and not a waste of time.	—	—
23. The purpose of a meeting indicates the degree of group participation desired.	—	—
24. The leader's function is always the same regardless of the type of meeting.	—	—
25. Conferences are particular types of meetings, and all meetings cannot be called conferences.	—	—
26. The term "conference" is always used correctly in business.	—	—
27. Only the first five types of meetings are used in on-the-job business activities.	—	—
28. A conference could be held by correspondence and meet the requirements set up in the definition in Chap. II.	—	—
29. The standard used for the comparison of types of meetings is the extent to which the group controls the decision.	—	—
30. Type 3, 4, and 5 meetings are the only conference-type meetings.	—	—

Answers: 1F, 2F, 3T, 4F, 5F, 6T, 7T, 8F, 9F, 10F, 11F, 12F, 13T, 14T, 15F, 16T, 17F, 18F, 19T, 20F, 21T, 22T, 23T, 24F, 25T, 26F, 27F, 28F, 29F, 30T.

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SUGGESTED EXERCISES AND OBSERVATIONS

1. Over a period of a few days, classify the various meetings you experience according to the six types. Remember that some meetings may be a combination of two of the possible types and that others will fall somewhere between two adjacent types as shown progressively in Fig. 1. Do not restrict yourself to formal meetings alone; analyze incidental and fortuitous groups as well.

2. While classifying meetings as suggested in 1, estimate the degree to which one man controls the meeting, checking it by considering the degree to which the group participates in the determination of the conclusion reached.

3. Observe carefully those meetings which you feel may be conferences, watching for the expression of individual reactions and for the obtaining and checking of group acceptance.

4. Observe whether there is a recognized leader in all meetings. In those instances where the group "just grows" into a meeting or conference, watch to see if some individual finally takes over or emerges as the group leader.

5. Note whether the proper type of meeting was used for the objective sought, and, in those cases where an improper choice was made, decide upon which type of meeting should have been selected. Compare the effectiveness of those meetings for which the proper type was selected and used with those in which such was not the case.

CHAPTER III

THE NORMAL THOUGHT PROCESS AND HOW WE LEARN

THE NORMAL THOUGHT PROCESS AND CONFERENCE LEADERSHIP

Before we delve into the practical psychology of group thinking upon which conference leadership is based, we must review briefly some of the more pertinent points relating to how people think as individuals. In conference leading we are concerned with the inherent, involuntary psychological reactions through which people accept and believe the conclusions reached as a result of conference discussion. It is not necessary to go into a long involved treatment of how we learn and the whys and wherefores of what makes us react favorably or unfavorably. All that is necessary to supply the foundation upon which we shall build the structure of conference leadership is an understanding of how our thinking processes developed from their origins in earlier civilizations into those upon which our present-day procedures are based. In this chapter we shall be concerned with how we learn as based upon how we think. Our involuntary mental reactions and our acceptance of ideas will be covered in a later chapter.

Without participation by group members, there could be no conference. The degree to which an individual participates is directly dependent upon two things: his knowledge of the subject under discussion and what is called "the Normal Thought Process." It goes without saying that the conference leadership method must be based upon and must take into account the Normal Thought Process. If it does not, the conference leader will be constantly fighting windmills and the conferences which he conducts will be ineffective because of their conflict with the natural, involuntary human instincts and reactions. We are most easily and effectively guided and influenced when what we experience is consistent with our involuntary impulses and reactions. We tend instinctively to oppose the unnatural, super-

ficial, or artificial but unfortunately often fall victims to our emotions and deviate from the Normal Thought Process. It seems to be an inborn failing of man, when left to his own devices, to overcomplicate life since complexity flatters him and gives him a feeling of self-importance. Nature herself tends towards simplicity, even though at times our interpretations of its manifestations give an appearance of complexity.

THE NORMAL THOUGHT PROCESS AND COMMON SENSE

The natural common sense of logic, as evidenced in what is termed "the Normal Thought Process," took many centuries to impress itself sufficiently on man's consciousness so that he would fall in line with his own inherent reactions. As far back as the fourth century before Christ, Aristotle was stating the fundamentals of sound, normal reasoning, which were expanded into what was termed "the scientific method" by Francis Bacon in the seventeenth century and applied to everyday problems by Herbert Spencer in the nineteenth century.

Aristotle's original premise was that the first and natural step in solving any problem consists of the recognition that the problem exists through the isolation of it from related things. He held that this would be followed by working out a solution. Francis Bacon later rediscovered and stated the fundamental principle in what developed into the present-day scientific process. Through his efforts, supplemented by those of Spencer, the following four steps were evolved:

NORMAL THOUGHT PROCESS

- Step I. Recognize and isolate problem.
- Step II. Assemble known facts and evaluate them.
- Step III. Make trial conclusion which may have to be changed, modified, or varied.
- Step IV. Set up final conclusion.

A fifth step is often added to the four given in the Normal Thought Process and the new process is then called "the scientific method." This fifth step is: Check results to determine need for revision. Actually, this is a part of Step III of the Normal Thought Process which provides for modification after trial in the case of problems which have no varying conditions. In practical everyday industrial and scientific problems, change

is ever present and methods must be revised accordingly after use for a period of time.

Until Bacon and his contemporaries took the common-sense attitude of the Normal Thought Process, human reasoning was a mixture of facts, wishful thinking, and superstition. As an illustration, consider the centuries upon centuries during which doctors held to the theory that the blood did not circulate through the body in spite of the incontrovertible evidence offered by each and every wound that they treated. Likewise, astronomers and mathematicians calmly ignored all the evidence supporting the rotation of the earth about the sun and adhered to their elaborate systems based upon the earth as the center of the universe.

All our present-day industrial and scientific development stems from the clarification of thought and the establishment of logical procedures for the solution of problems through the evaluation of known facts and their adjustment through trial solutions to reach a sound conclusion. Nowadays our education and training drill us in the repeated use of such a procedure until it becomes a part of us without our being conscious of its existence as a definite process. Engineering and scientific training in particular call for constant repetition and application of it. In practically all businesses, and particularly in those based on technical or engineering operations, the scientific method is a vital part of operating procedure. We are all exposed to it from the very day we start work, but seldom is it expressed or taught as a means of attacking and solving our problems. Much would be gained if we learned the Normal Thought Process and the scientific method as a basic part of our training in schools, colleges, and businesses, instead of absorbing them through the business and teaching procedures which use them.

DEDUCTIVE AND INDUCTIVE REASONING

The Normal Thought Process is a general procedure that can be applied in two different ways since there are only two general methods of thinking and reasoning. These are called deductive reasoning and inductive reasoning. Deductive reasoning consists of deriving a conclusion from known facts by analyzing and evaluating them so as to eliminate all inferences which cannot be proved or demonstrated to be true. It takes the facts which are

assembled in Step II of the Normal Thought Process and analyzes each one of them, classifies and compares them, and evaluates them into a conclusion based only on what has been demonstrated and is known to be true. Thus in reasoning to a conclusion no inferences as to what might be true are accepted.

Inductive reasoning takes a set of facts and analyzes them, classifies and compares them, and then, through inference as to what may be assumed to be true as a result of what is already proved, arrives at a conclusion based on known facts plus infer-

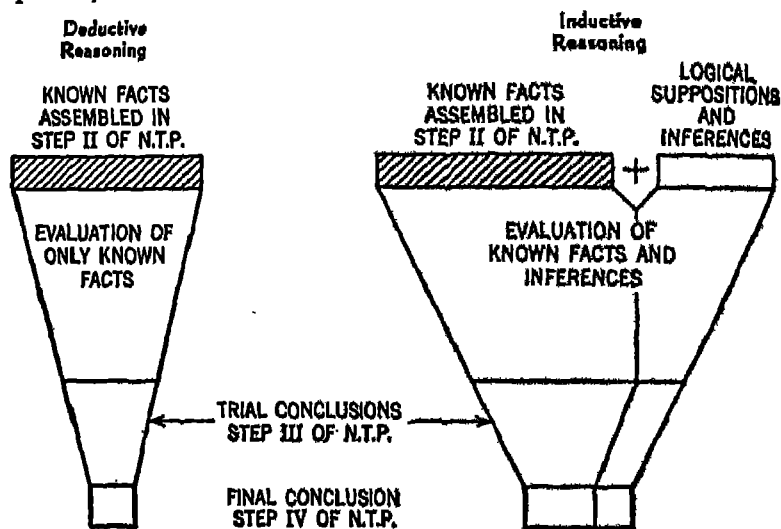


FIG. 4.

ence. It differs from deductive reasoning in that, by using the same set of facts as a base and associating them in the light of what may be inferred from what is known, we arrive at a conclusion which differs from a deductive conclusion by the element of logical assumption which has not been proved but only inferred. In a sense, inductive reasoning is creative or synthetic in nature since it puts together different known facts in a new form using a binding material of supposition.

The two diagrams shown in Fig. 4 illustrate in a graphic way what we have defined as deductive and inductive reasoning processes.

From the diagrams it is easily seen that when we use deductive reasoning in the evaluation of the assembled facts in Step II of the Normal Thought Process, we employ only what is known

and can be proved in making our analysis, classification, and comparisons. In the inductive reasoning process we make our comparisons and evaluations of the same known facts in the light of logical inferences and suppositions. Thus, after narrowing down to a trial conclusion, we can arrive at two different final conclusions, depending on the method of reasoning used. It must be noted, however, that in making our trial conclusions, we put our suppositions in the inductive method to an actual test. If we go on and add the additional step to the Normal Thought Process which gives us the scientific method, we would check the results of our final conclusions after they had been in actual use and then revise them accordingly. Thus the scientific method provides the adjustment through actual trial of any differences in conclusions which might be reached. This is most important since, through the synthesis of inductive reasoning, we are able to make progress. Inductive reasoning is the backbone of research. Through this method our research laboratories devise new theories and methods which are revised in the light of actual experience.

THINKING AND REASONING IN BUSINESS AND OUR DAILY LIVES

Both deductive and inductive reasoning are constantly being applied in our day-to-day lives on and off the job. It is important to know when we must restrict ourselves to the proved, purely factual deductive process and when we should take the developmental path of inductive reasoning. The danger in the inductive method lies chiefly in allowing emotion rather than logic to enter into our inferences and suppositions. There are times, however, when we have no alternative but to use an inductive reasoning process. This occurs where we do not have all the necessary information and facts for the solution of the problem on a proved, factual basis. It is important to know when such a condition exists and to realize that, unless we want to go to the time and expense to obtain the proved facts, we must use an inductive reasoning process. In cases where the facts and information required do not exist, we have no alternative but to use inductive reasoning. Obviously, this is the situation which applies in all creative research.

There is nothing so tiring or so futile as a day-to-day business conference in which the leader conducting it does not realize

the difference between deductive and inductive reasoning and that you cannot take a set of incomplete facts, merge them with some assumptions, and arrive at a conclusion which is absolutely factual and watertight in every way. Days or even hours spent in this way are wasted, besides being a strain on the group members, owing to their many attempts to produce an acceptable answer. In the end, the development of the procedure or the conclusion must be put off until more proved facts can be obtained or the ranking authority just reaches into the air and draws down some figures. When the leader has full realization of the normal thought process and the two general methods of reasoning, he can size up the problem, attack it intelligently at the beginning, and make a decision as to whether or not an inductive approach will be satisfactory.

Let us hope that the day is not too far in the future when educational institutions and businesses will consciously and definitely equip people with the correct approach to problems. In business as well as in schools and colleges, more systematic instruction in the organized thinking approach to problems is necessary rather than repeated exposure to its application. The businessman and the student who find that the available facts and material at hand for the solution of a problem are inadequate for a deductive solution must realize that the solution becomes inductive in nature when assumptions are added. In occasional instances, it is even necessary to point out a possibility of solution through the use of logical assumptions. The necessary ideas and procedures are often taught in classes in elementary psychology and logic but few attempts are made to see that these principles are applied to the problems met in other courses of study or in everyday business problems. Businesses, as well as colleges, should provide those who need it with specific training in how to study, because this is a necessary tool to all who work with their minds.

When conducting conferences and controlling and shaping group reasoning, we must be aware of the two alternatives which are open to us, since group reasoning can be deductive or inductive in nature the same as individual reasoning. There are times when each is in order; there are also times when the application of inductive group reasoning may not be warranted since the development of a conclusion based on other than established

facts may not be acceptable. As we shall see, the conference leader, through his position of controlling and shaping the discussion, can determine the path taken by the group.

HOW WE LEARN

Now that we have reviewed the way in which we think, we are ready to look into the way in which we learn. Before we can gain acceptance of a conclusion we must have an understanding of it, and understanding is achieved through learning. We learn through our five senses of seeing, hearing, smelling, feeling, and tasting. We can learn through any one of the five, through a combination of them, or, in rare instances, through all of them. It is accepted that the more senses we use in learning, the better our learning experience will be. However, long experience has shown that we learn best through seeing and that we achieve permanency of learning through doing. Thus, an automobile mechanic would learn to make a carburetor adjustment through hearing what he was told, seeing his instructor make an adjustment, and actually getting the feel of doing it through trying it himself. He would be using three of the five senses in learning. In learning when the gasoline and air mixture was too rich in gasoline, he would also use his sense of smell.

In conference leading we learn through seeing, hearing, and doing in that actually to learn conference leadership, we must try it. This is covered in some detail in subsequent chapters.

From what we have learned about the Normal Thought Process and how we think, it is evident that we learn by associating and comparing the new ideas which are presented to us with the old or known and established ideas we already have. Consider for a moment the difficulty we would encounter in trying to explain to an untutored native in the African jungle how a phonograph reproduced music. There would be nothing in his background of known experience to which he could associate the new ideas. Similarly, it would be difficult for him to convey to us the sensations and feelings that the sound of the tom-tom conjured up in his mind.

Much of the accumulated knowledge and research in the psychology of teaching and learning can be summed up in the simple statement that "things come out of the head" in exactly the same way that they "went into it." This fact cannot be

changed; therefore, the teaching-learning process must be set up in such a way as to see that what is to be learned "goes into the head" properly and also provide checks to make sure that it "comes out of the head" properly.

THE FOUR-STEP TEACHING-LEARNING PROCESS

In view of the fundamental position that the normal thought process occupies in human progress and achievement, it is not surprising that the accepted teaching-learning process for vocational on-the-job training is a four-step process. The four-step teaching-learning process, as we know and practice it, is as follows:

THE FOUR-STEP TEACHING-LEARNING PROCESS ACCORDING TO ALLEN

- | | |
|-----------------------|--|
| Step I. Preparation | Prepare the learner by associating the thing to be taught with something already known |
| Step II. Presentation | Show the learner the thing to do and tell him the things to know |
| Step III. Application | Have the learner try it, correcting him where necessary |
| Step IV. Test | Have the learner do it unassisted to prove he knows it |

We can see at a glance that the four-step teaching-learning process and the Normal Thought Process are identical in form and general intent. The four-step teaching-learning process does not include the preparation necessary on the part of the teacher before starting the actual act of teaching. This is vitally important to the success of teaching or training but is not a part of the actual act of the training itself. Let's look at the Normal Thought Process and the teaching-learning process when they are set side by side:

NORMAL THOUGHT PROCESS

- Step I. Recognition that problem exists
- Step II. Assembling of known facts and evaluation of them
- Step III. Trial conclusion which may have to be changed, modified, or varied
- Step IV. Final conclusion

TEACHING-LEARNING PROCESS

- Prepare the learner by associating the thing to be taught with something already known
- Show the learner the things to do and tell him the things to know
- Have the learner try it, correcting him where necessary
- Have the learner do it unassisted to prove he knows it

Recognition that a problem exists and preparing the learner by focusing his attention on what is to be learned and by associating it with something he already knows are of the same fundamental nature. Assembling and evaluating known facts are parallel in significance to showing the learner what is to be done and telling him what he must know in order to do it. In like manner, setting up a trial conclusion which is changed and modified in the light of experience is merely a general statement of what takes place when the learner tries to apply what he has been taught and the teacher corrects him and revises his procedure until he can do it without error. A final conclusion to the teaching-learning process is reached when the learner demonstrates that he can perform the new work operation on his own without any assistance from the instructor.

If we consider the teaching-learning process step by step, it is evident that Steps I, II, and III are concerned with "getting it into the head properly" and Step IV, with "checking to see that it comes out of the head properly."

Of course there are many teachers and psychologists who have developed teaching-learning processes which vary in the number of steps used and in terminology as well. They can all be boiled down to fundamentals and checked against the Normal Thought Process. When this is done, it is found that the four-step teaching-learning process according to Allen gives the most direct, simple tie-in. Therefore, it is what can be termed the basic, fundamental teaching-learning process. When necessary to meet special conditions, the various steps can be subdivided and extended; however, when collapsed into the fundamentals, they are the equivalent of the four-step process.

It is interesting to note that nine of the many teaching-learning plans which have been developed vary in the number of steps they contain. Some plans have as many as six or seven steps but cover only three of the essentials listed under the normal thought process. Experience has shown that the most successful plans include all the steps in the Normal Thought Process and that the most logical, useful plans are the four-step plans, no matter what name or description is given to the steps.

In the form in which we have shown it, the four-step teaching-learning process can be used directly in the instruction of individuals since it applies most readily to the teaching and learning

of a job of a manual or of a combined manual and mental nature. It is used most effectively in what is called "job training" wherein craftsmen are taught on-the-job by their supervisors and sometimes by fellow employees. We shall see later how the basic four-step teaching-learning process must be adjusted and extended to apply to classroom teaching.

In our discussion of the teaching-learning process, we have only scratched the surface and have not intended to cover the whole story of training people in the performance of their jobs. A reasonably complete knowledge of training methods is of value to conference leaders since there is a close tie-in between teaching and the "gaining of understanding" features of conference leadership. No attempt has been made to expand the basic teaching-learning process into the teaching methods and techniques which are involved. In training employees on-the-job as in conference leadership, skill comes only with practice; in training conferences designed to equip supervisors to train employees on-the-job, actual practice teaching is essential.

LEARNING AND THE AGE OF THE LEARNER

Even this brief treatment of teaching and learning would be incomplete as well as open to the criticism that "a little knowledge is a dangerous thing" if we failed to touch on the subject of the relation between learning and age. A great deal of damage has been done through the inadvertent spreading of the idea that the ability to learn decreases as we grow older. This has been disproved by exhaustive field and psychological laboratory tests. The restricted treatment of learning as applied to conference leadership does not include nor require detailed investigation of this matter. However, given average normal intelligence, there is no real decrease in learning ability from maturity until the effects of old age or sickness become factors. Thus the decrease in learning ability between the age of mental maturity (sixteen to eighteen years) and sixty-five to seventy years of age is negligible. In many instances full learning ability is retained far beyond seventy years if health and physical condition do not become factors. As a result, there is no reason why older people cannot learn to do new jobs, although at times, their wide experience may appear to give difficulty. Because they have such a large number of things with which new ideas might be associated,

it may take them a little more time to make the extra trials to tie in new ideas correctly than in the case of younger people whose recency of learning experience in schools and more limited background aid them. When this first hurdle has been passed, the broader experience and more mature ideas of older persons result in more comprehensive and better learning, if all general conditions such as individual intelligence are the same.

What we have said here with respect to learning and age applies in those instances where the new job to be learned is of the same general classification as the learner's past experience with respect to the amount of manual and mental activity required. It is true that after the age of forty, retraining in fundamental subjects such as mathematics, physics, and English is required if we expect an individual to change from work principally manual in nature to that in which the emphasis is on mental activity. Although this change requires hard work on the part of the individual since it is necessary to get back into a forgotten and therefore somewhat unfamiliar field, there have been innumerable instances in which it has been achieved when the proper preliminary preparation has been given.

TEACHING-LEARNING IN ADMINISTRATIVE WORK

Job training in business and industry is usually excellent where training in the skills required in the factory or manual working trades is involved. Unfortunately, the reverse is true in most cases where office or administrative workers are trained on the actual jobs that they do. This is probably due mainly to the lack of prepared job analyses and training outlines. However, their main benefits can be gained if care is taken to break the job down into its so-called "work items" and the four steps of the teaching-learning process are observed.

In this chapter we have considered how we think and how we learn, both of which will apply in the same general way for groups of individuals such as conferences as they do for individual people. Later, as we develop the conference discussion process and the leader's techniques for handling it, we shall find that these fundamental rules of thought and learning combine with those which govern our involuntary mental reactions to provide a practical leadership method based on natural human reactions.

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EITHER OF THE TWO
GENERAL METHODS OF
THINKING MAY BE
USED IN STEP II
→
DEPENDING UPON
WHETHER FACTUAL
OR CREATIVE
CONCLUSION
IS DESIRED

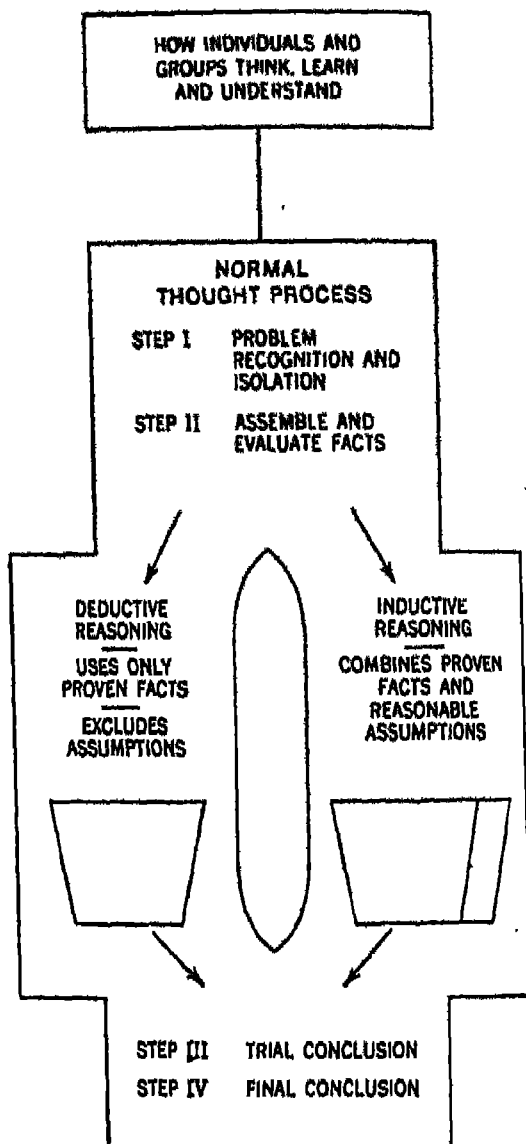


FIG. 5.—Flow diagram summarizing Chap. III.

COMPLETION QUIZ

Write in missing words

1. The natural common sense of logic is termed the _____
2. We tend instinctively to _____ the unnatural, superficial, or artificial.
3. When left to his own devices, man usually _____ his problems.
4. Without _____ by the members of the group, there could be no conference.
5. There are _____ steps in the Normal Thought Process.
6. The two general methods of thinking and reasoning are called _____ and _____.
7. Inference does not enter into _____ reasoning for it sticks to proved facts.
8. _____ reasoning is creative or synthetic in nature.
9. Either of the methods of reasoning may be used in Step _____ of the Normal Thought Process.
10. Group reasoning may be either _____ or _____ in nature.
11. We learn through our _____.
12. _____ is the best way to learn but _____ gives it permanence.
13. In conference leading, we learn mostly by _____, _____, and _____.
14. New ideas must be associated with _____ ideas if we are to learn readily.
15. Things come _____ of the head in exactly the same way they _____.
16. The job-training teaching-learning process is a _____-step process.
17. The steps in the teaching-learning process are
 - a. _____
 - b. _____
 - c. _____
 - d. _____
18. The steps in the Normal Thought Process are
 - a. _____
 - b. _____
 - c. _____
 - d. _____
19. _____ by the teacher is not included in the teaching-learning process as it precedes the actual teaching.
20. Ability to learn _____ decrease with age.

Answers: 1. Normal Thought Process. 2. oppose. 3. overcomplicates. 4. participation (or acceptance). 5. four. 6. deductive, inductive. 7. deductive. 8. Inductive. 9. II. 10. Inductive, deductive. 11. two senses. 12. Seeing, doing. 13. seeing, hearing, doing. 14. old. 15. out, go, into, it. 16. four. 17. Preparation, Presentation, Application, Test. 18. Isolation of problem, Assimilation and evaluation of facts, Trial conclusion, Final conclusion. 19. Preparation. 20. does not.

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SUGGESTED EXERCISES AND OBSERVATIONS

1. Using problems that arise both in business and elsewhere, check the way they are handled (either by yourself or others) against the steps in the Normal Thought Process. The problems selected need not always be of a complex business or engineering nature, as the checking of the solution of simple, everyday problems of living is fundamentally the same.

2. Select some reports and analytical forms used in a business of any kind and see just what part they play in the solution of the problem of which they form a part. Note in particular whether they are a part of Step II, III, or IV of the Normal Thought Process. Are there any calculations, classifications, or comparisons required which lead to a trial or final conclusion? Distinguish between those reports, forms, and analyses which merely gather and evaluate facts as part of Step II and those which seek to direct the user through Steps III and IV.

3. Study some job instructions that direct one through the various steps of the job, noting the steps in the Normal Thought Process which are covered. Directions for the use and operation of equipment, building things, and even a cookbook will provide interesting material to check against the Normal Thought Process.

4. Select a mystery story by your favorite author and check the reasoning process used in arriving at a specific conclusion to see whether it is deductive or inductive. See if you can find in the mystery an illustration of the opposite type of reasoning from that first observed.

5. Select a problem in your business or your personal affairs and analyze and solve it using the Normal Thought Process, consciously selecting and following either deductive or inductive reasoning for use in Step II. Repeat, using the other method of reasoning, and compare the results obtained.

6. Teach someone a simple manual action using the four-step teaching-learning process. This can range from a job at work to teaching a child how to solve a mechanical puzzle. Be sure to follow all four steps. For comparison, try teaching someone else the same thing by telling them how to do it and then having them try it unassisted. Check your own reactions to both methods even though the learner may occasionally complete Step IV, Test, successfully in the second case.

CHAPTER IV

THE GENERAL CONFERENCE PROCESS

THE NATURAL STEP-BY-STEP PROCEDURE IN GROUP DISCUSSION

It requires no crystal ball or long tortuous process to arrive at the supposition that the General Conference Process in its fundamental form can be most effectively and accurately expressed as a derivative of the Normal Thought Process. This must be true if it is to fall in line with the Normal Thought Process and the normal human reactions which it should not controvert.

Before stating the actual steps in the General Conference Process, it might be well to review, in a narrative way, the desirable things which should take place in a conference gathering if its objective is to be achieved. From them we can derive the steps of the conference process in a natural manner.

When a group gathers for a conference, it must be called to order and its attention focused on the business at hand to stop the general conversation which takes place during the time that the group members are arriving. The first objective of the leader of the group is to get everyone thinking about the opening topic for discussion. Often a casual approach to the conference subject is made from ordinary conversation and, when this is done, it is important that the topic for discussion be isolated and clearly outlined and defined in the minds of all of the group members. As a necessary part of such a procedure, we must be sure to set up the limiting conditions or ground rules, such as making it clearly understood whether the subject is of a general nature or deals with a specific, particular case. In addition, it is vital that the purpose of the meeting be understood so that the group knows where it stands. As we shall see later, this has a direct bearing on the function and technique of the conference leader. The leader's method of handling should make the group aware of the type of meeting discussion which is intended.

All these preliminary items set the stage for the actual discussion and form the first step in the General Conference Process, which is called the Approach. Naturally we must limit ourselves to those types of meetings which are conferences. After the group is clearly aware of the topic for discussion and its scope, Step I, the Approach, is finished. The leader should then stimulate discussion of the topic by the members of the group so that all views with respect to it are expressed and the reactions to the views obtained. In other words, this is a Drawing Out of the group to obtain all the facts having a bearing on the discussion. It also presents an opportunity for the interchange of thoughts and reactions necessary to gain the adjustment in the views of the individual group members to set the stage for group acceptance. Step II is called Drawing Out.

So far the conference discussion has been concerned first with achieving understanding of the topic for discussion, its limitations, scope, and the definition of any controversial words appearing in the statement of it. Secondly, in Step II, Drawing Out, the quest for understanding has been continued in the expression of ideas and reactions and the adjustment of the views of the various group members.

The next function of the conference discussion concerns the item which is peculiar to conferences as against other types of meetings. This is acceptance by the group members of the conclusion reached. Here the readjustment of ideas continues as Acceptance by individuals and by the group as a whole is obtained. Voluntary participation and acceptance are the outstanding characteristics of conferences. As we have discussed in earlier chapters, the expectancy of complete group acceptance varies with the type of meeting; it is only about 50 per cent for those types of meetings which we call "conferences." Thus it is only natural that checks will have to be made to see that group acceptance has been gained, at least to a degree which is consistent with the expectancy for the conference type of meeting held. This is known as Acceptance and is Step III in the conference procedure.

When we were discussing the reasons why conferences fail, we found that there were four important but simple reasons for failure. Omitting proper summing up of the conclusion reached in a discussion was among these four items. Thus we can see

that, if we are to avoid stumbling into the pitfalls that we have already discovered, we must not fail to provide for summing up the discussion in our General Conference Process. This is the fourth step in the process and is called Summation. Summation consists of summing up the conclusion accepted by the group and putting it into words which are acceptable to all. It states in condensed, concise form the pertinent features agreed upon as a result of the discussion. It should be written on the board where all can see it, since seeing is our most acute sense from a learning standpoint. Actually we will find it both helpful and advisable as the discussion progresses to provide some means of writing out in common view the key ideas and expressions that are developed. This is necessary if we are to gain the advantages of using two of our senses instead of only one, that of hearing. One of the reasons why difficulties are experienced in day-to-day business conferences lies in the lack of a means for writing out the items under consideration and the conclusions considered for acceptance where the group as a whole can see them. Crayons and easels with large sheets of paper should be provided for this purpose. The used sheets, when turned over the top of the easel, can be kept for ready reference as required during the conference.

It is practically impossible in this world to deal with a single item which bears no relation to anything else. As a matter of necessity, we must make sure that any decision, viewpoint, or conclusion that is reached is properly related to other associated items and to the over-all objective of the business or the training of which it is a part. Failure to do this eliminates a final check as to the accuracy and workability of the decision that has been reached. Unless it is workable, logical, and reasonable, it is worse than useless for it has only confused the issue and the conference has been wasted. Since the final step knits the conclusion reached into the over-all chain, making it relate properly with other conclusions, Step V is called Association.

STEPS IN THE GENERAL CONFERENCE PROCESS

Suppose we take a look at the number and type of steps that we have built up as necessary to conducting a conference. Listed in the order that we discussed them, they are as follows:

GENERAL CONFERENCE PROCESS

- | | |
|-----------|-------------|
| Step I. | Approach |
| Step II. | Drawing out |
| Step III. | Acceptance |
| Step IV. | Summation |
| Step V. | Association |

As in the case of the teaching-learning process, we have not included the very important preliminary preparation by the leader which precedes the actual conference session itself. We have included only those steps concerned in the actual handling of the discussion, for the preliminary preparation precedes the actual discussion and is not a "doing" part of it.

COMPARISON OF THE GENERAL CONFERENCE AND NORMAL THOUGHT PROCESSES

We find that, as a result of our narrative building up of what should go into a conference process, we have a five-step instead of a four-step process. This calls for a check of what we have developed against the Normal Thought Process so that we may assure ourselves as to the validity of it. There are many listings and classifications of the steps that make up a conference process. Some of them which provide for as many as seven or eight steps only cover two or three of the basic requirements of what we have set up as our Normal Thought Process. In our case, we must check to see whether what we have listed covers all the essential four steps in the Normal Thought Process and also whether we have unnecessarily increased the number of steps beyond the basic four steps. Let us line them up side by side:

COMPARISON OF THE GENERAL CONFERENCE PROCESS AND THE NORMAL THOUGHT PROCESS

NORMAL THOUGHT PROCESS		GENERAL CONFERENCE PROCESS	
Step I.	Isolation of problem	Approach	Step I
Step II.	Accumulation and evaluation of facts	Drawing out	Step II
Step III.	Trial solution	Acceptance	Step III
Step IV.	Final conclusion	Summation	Step IV
		Association	Step V

From inspection of the two processes as lined up above, keeping in mind the descriptions of the five steps in the General Conference Process, we can see that Steps I of both processes fulfill the same general objective, which is primarily one of problem

isolation. Step I, Approach, of the General Conference Process is much wider in scope and interpretation than is the fundamental statement of Step I of the Normal Thought Process. A paralleling purpose is discernible in both of the Step II's since Drawing Out performs a function comparable to that of gathering and evaluating facts. When attempts are made in Step III to get Acceptance of a conclusion by a group, it goes without saying that several attempts will be made, which will require adjustment and changes before a conclusion acceptable to all has been formed. This performs the same function as the Trial Solution provided by Step III of the Normal Thought Process.

Summation, Step IV of the General Conference Process, and Final Conclusion, Step IV of the Normal Thought Process, show their similarity in their wording. We find that Step V, Association, of the General Conference Process does not parallel or tie in with any of the steps of the Normal Thought Process. When we scrutinize it closely, we find that it is not actually a part of the conference discussion concerning the particular conclusion which was reached, for it ties that single conclusion into an over-all series of conclusions that might be reached during a conference. Furthermore, it relates the conclusion reached for that single item to the over-all policies and objectives of the business or the major principles concerned. When we recall that the Normal Thought Process concerned itself with only one special problem and its solution, it is not surprising nor irrelevant to have developed an additional step in the General Conference Process. Although it is not an inherent part of the Normal Thought Process itself, Step V is a necessary feature of business and industrial activities because it forms the binding material which links them together into a consistent over-all whole.

Close scrutiny of our Step II, Drawing Out, and Step III, Acceptance, will show that they are interwoven and overlap in many ways. In fact, in actual conference work it is sometimes difficult to draw a line between them. While the Drawing Out process is going on and individual group members are expressing their ideas and reactions, individual acceptance is gradually building up at the same time. It is difficult to separate out the discrete steps by which acceptance is built up, for it is added to from time to time as an individual accepts or rejects minor items. Acceptance varies with the participation in the discussion by the

group members and participation goes on throughout Steps II and III. However, it is vital that a separate check of acceptance be made prior to the actual summation to see that the group has accepted the principles involved in the conclusion reached. The basis and background for acceptance build up gradually by disconnected small leaps and bounds throughout the Drawing Out and Acceptance steps, but this does not relieve the conference leader of the responsibility for seeing that acceptance has been obtained. Furthermore, provision must be made for any necessary readjustments in actual acceptance. In some instances, checks of acceptance may force the discussion back into Step II for further Drawing Out before group acceptance can be obtained. From a practical operating standpoint, it is not wise for us to combine Steps II and III in one step as is sometimes done.

In the General Conference Process, we have developed a tool which provides the step-by-step procedure for handling any conference. This general procedure will always be basic to the handling of a conference discussion, for no matter what we may later set up as specific conference processes to meet practical everyday business needs, they will always be composed of the same five steps and the chief differences will lie in the way each of them is handled.

Although we have outlined the General Conference Process, so far we have not discussed the technique of handling conferences. It is readily seen that such a thing is required and that the conference leader is actively concerned at all times. The technique of conference leading as it relates to the conducting of the discussion is covered in subsequent chapters.

THE NORMAL THOUGHT, TEACHING-LEARNING, AND GENERAL CONFERENCE PROCESSES COMPARED

There are five steps in the General Conference Process and four in the teaching-learning process. They differ in many ways even though both are derived from the Normal Thought Process. They differ widely as to their methods of handling although experienced teachers and conference leaders know that at times both are used to handle particular items regardless of whether the over-all meeting is a conference or a school session. Later we shall discuss this phase of the subject more fully.

COMPARISON OF NORMAL THOUGHT, TEACHING-LEARNING, AND GENERAL CONFERENCE PROCESSES

Normal Thought Process	Teaching-learning process (job training)	General Conference Process
Step I. Isolation of problem	Preparation	Approach Step I
Step II. Accumulation and evaluation of facts	Presentation	Drawing out Step II
Step III. Trial solution	Application	Acceptance Step III
Step IV. Final conclusion	Test	Summation Step IV
		Association Step V

From the relationship between the Normal Thought, Teaching-learning, and General Conference processes, it is again apparent that the General Conference Process departs from the general relationship that exists between the other two, aside from the fact that its steps are five in number.

**THE GENERAL CONFERENCE
AND THE FIVE-STEP TEACHING-LEARNING PROCESS
FOR CLASSROOM TRAINING**

Although detailed treatment of it is not within the scope of this book, it is interesting to observe that the teaching-learning process for theoretical or classroom training is also a five-step process and that the fifth step, which is called Generalization, performs the same function as Step V, Association, in the General Conference Process. Even though we shall not discuss the wide differences in handling between the four-step teaching-learning process used in job training and the five-step teaching-learning process for theoretical or classroom training, the comparison between it and the General Conference Process is shown below:

**RELATION BETWEEN GENERAL CONFERENCE PROCESS AND THE FIVE-STEP
TEACHING-LEARNING PROCESS FOR THEORY TRAINING**

GENERAL CONFERENCE PROCESS

- Step I. Approach
Step II. Drawing out
Step III. Acceptance
Step IV. Summation
Step V. Association

TEACHING-LEARNING PROCESS
(Theory training)

- Preparation Step I
Presentation Step II
Application Step III
Test Step IV
Generalization Step V

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In classroom teaching, the instructor always has to see that the material covered in each lecture or chapter is properly tied into and related with the preceding and succeeding chapters and lectures as well as with the over-all subject of the course. Thus an instructor who is teaching Newton's law of gravity must tie in and relate it to the laws of falling bodies and all other laws governing motion. Theory teaching is therefore different from job teaching or training, where the supervisor is concerned with teaching the employee single specific work operations.

Both the General Conference Process and the theory teaching-learning process involve mental activity alone and not manual activity and thus require the tie-in step which is not an actual part of the four-step Normal Thought Process.

GENERAL APPLICATIONS AND SIGNIFICANCE OF THE GENERAL CONFERENCE PROCESS

The General Conference Process has a myriad of applications in countless human activities. In business and industry we find that, in addition to providing the basic building block for our practical conference leadership, it also can be adjusted to provide a natural, logical sales procedure. The clergyman, the doctor, the lawyer, the storekeeper, and, of course, the foreman and the supervisor as well as the executive of any business can apply the General Conference Process in their dealings with groups of people.

In the preceding chapter, we dealt briefly with the relationship between learning and age. It was evident that older, more mature people must sometimes make several trials before they can associate a new idea with an old idea suitable for learning purposes. This, it will be recalled, is due to their much wider background of experience and it sometimes occasions a feeling of inability to learn because of the necessity for making a few trials that will have to be checked by the wise supervisor or instructor. This one particular difficulty in learning experience makes the conference method doubly effective for the more mature learner since it provides a chance for the expression of reactions and acceptance on the part of the conferee. Through this interchange, the necessary trial and adjustment to find the correct tie-in idea for learning can be accomplished.

Business and industrial concerns, whether technical or not, will find that it pays big dividends when conducting regular training classes for instruction of a mental or a theory nature to provide conference discussions in Step III of the theory teaching-learning process, Application, rather than simple recitations of the question and answer type, which check understanding only.

In job training, however, where actual job operations are being taught, acceptance is not a part of Step III, Application by the learner, for there we are concerned only with the actual job itself. In the four-step teaching-learning process, it is necessary as part of Step I to make the checks to see that the new idea is correctly associated, and acceptance is not a requirement.

The fact that older, more mature people are naturally conditioned to learn better where acceptance is part of the process should not obstruct the choice of the type of meeting required to meet properly one's objective for holding the meeting. Where an out-and-out order is necessary and discussion or acceptance will gain nothing, a Type 1 meeting still fills the bill. Care must always be taken to suit the type of meeting used to the limiting conditions, requirements, and objective.

In this chapter, we have developed the General Conference Process as a five-step process and have oriented it with respect to the basic principles of individual and group thinking. Through comparison we have shown its relation to teaching and learning and have brought out again the similarity between the two processes as well as the chief point of departure, that of gaining acceptance as well as understanding. By properly associating our ideas with respect to how we think, learn, and react mentally with the application of the General Conference Process to specific discussion problems, we shall be able to build a logical basis for conference leadership.

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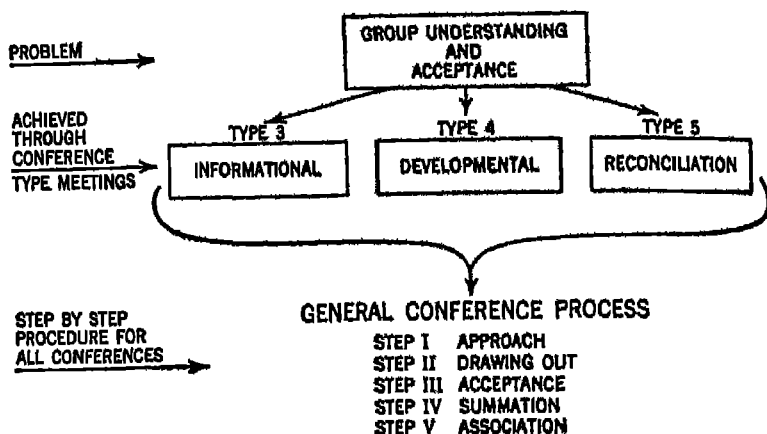


FIG. 6.—Flow diagram summarizing Chap. IV.

MATCHING QUIZ

Match the proper letter to each number so as to get complete correct statements

- | | |
|---|---|
| 1. The General Conference Process is | A. closely related and overlap in many ways. |
| 2. A conference group must first be made aware of | B. the four steps in the Normal Thought Process. |
| 3. After a conference group is clearly aware of the topic for discussion and its scope, the leader stimulates | C. a part of Step III, Application. |
| 4. The one thing peculiar to conferences is | D. the way in which each of them is handled. |
| 5. The conclusion reached by a group must be | E. the scope and limitations of the subject to be discussed. |
| 6. Since no single subject in this world can be completely isolated from everything else, a conference conclusion has | F. the General Conference Process in their business or professions. |
| 7. Approach, Drawing Out, Acceptance, Summation, and Association are | G. acceptance is part of the process. |
| 8. The first four steps in the General Conference Process match | H. the discussion to draw out the group's ideas and reactions. |
| 9. Step II, Drawing Out, and Step III, Acceptance, of the General Conference Process are | I. inconsistent with the Normal Thought Process. |

- | | |
|---|--|
| 10. The chief difference between the General Conference Process and the three specific conference discussion processes is | J. nothing will be gained by discussion. |
| 11. In job training, acceptance is not | K. a derivative of the Normal Thought Process. |
| 12. Older, more mature people naturally are able to learn better where | L. a summary statement acceptable to the group. |
| 13. Where an out-and-out order is to be issued | M. an association and tie-in with other conclusions reached. |
| 14. The clergyman, the doctor, the lawyer, and the storekeeper can use | N. acceptance. |
| 15. The extra step in the General Conference Process is not | O. the five steps in the General Conference Process. |

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Answers: 1K, 2E, 3H, 4N, 5L, 6M, 7O, 8B, 9A, 10D, 11C, 12G, 13I, 14F, 15E

SUGGESTED EXERCISES AND OBSERVATIONS

1. Try out the General Conference Process in a day-to-day business conference or, better still, try to guide a conversation in a group of friends through the five steps to a conclusion acceptable to all. For your initial trial be sure to select simple subjects that are not too long.

2. Observe and check conferences and conversations in which you participate, watching for the five steps to appear. Note any that are omitted and the effect of their omission on the discussion. Check your impressions as to the naturalness of the General Conference Process as a discussion sequence.

3. Consider and decide upon the part that acceptance plays in conference discussion and how it relates to the degree of participation by the group members. Is there a real difference between gaining understanding and understanding plus acceptance?

CHAPTER V

THE FUNDAMENTALS OF LEADERSHIP TECHNIQUE AND OUR INVOLUNTARY MENTAL REACTIONS

THE HUMAN SIDE OF CONFERENCE LEADERSHIP

In many ways conference leading is one of the most useful, fascinating, and vital experiences we can have. As conference leaders we deal with people by guiding and, at times, controlling their thoughts and reactions. Throughout our lives, we cannot avoid contact with people and must achieve to some degree the ability to get along with them if we are to live in amity and retain a normal mental balance. Success and in some cases the ability to survive depend largely upon this quality. The problem has many facets, almost as many as there are people, but fortunately there are some broad, general guiding principles upon which to base our efforts and which we can shape to fit individual or group cases as soon as we are aware of their meaning and use. Time does not permit us to develop, explore, and substantiate most of the rules and principles that we will discuss. They can be accepted as axioms, because many years of psychological research and, what is more important, observations of their practical everyday applications have proved their validity.

People and their actions and reactions constitute a subject in which we are all interested, whether we will it so or not, for we cannot help reacting favorably or unfavorably to them with resulting effects upon both ourselves and the other persons. In this chapter, we shall consider a few of the ideas upon which leadership methods are based, as a preliminary to explanation of the specific conference processes which are derived from the General Conference Process. In later chapters a more comprehensive treatment of both the characteristics of the leader and the types of individuals found in groups, together with the

procedures for conducting and controlling discussion, will be given.

THE FUNDAMENTAL HUMAN URGES

Before proceeding further, we should call to mind what are termed the two primary motivating urges from which come all our thoughts, actions, and reactions. All our behavior, when viewed in the light of its fundamental reason for being, can be attributed to one or the other of them. The two fundamental urges are

1. I want.
2. I want to be.

Our first and most compelling desire is "I want." This is often called the instinct for self-preservation since our first wants involve those things necessary to living and comfort such as food, shelter, and heat. These can be expanded to include not only the absolute necessities of our day-to-day existence and comfort but the things which give security.

When we have taken care of our immediate physical desires, we feel an urge to expand and play the part of the magnanimous benefactor toward our fellow beings. This basic human urge to want to do for others inflates and flatters our ego, giving us a feeling of importance as well as beneficence and doing good. In other words, "I want to be." The first expression of this is our desire to provide the physical comforts for those closest to us whom we love. We all have an innate consciousness of Deity and feel that we are being observed and judged for our motives as well as for our actions, which spurs us on as does our natural desire to be big shots. It is interesting as well as informative to check the things we do and want others to do in the light of these two fundamental urges. As we develop our leadership methods, we shall see many tiebacks and manifestations of them. They do not apply to conference leadership alone but are basic to any type of leadership.

In earlier chapters, we said that a conference could not exist without group participation since it requires an oral interchange of thoughts and reactions. We must consider what impels an individual to participate in a discussion and how we can use this to achieve group acceptance of a conclusion or decision.

ZONES OF KNOWLEDGE

Since a conference is based upon the expression of thoughts and reactions to them, an individual's participation must depend upon his knowledge of the subject under discussion and his willingness to talk about it. The knowledge possessed by an individual with respect to a particular subject falls into one of three general classifications, depending upon his status as an authority. These "zones of knowledge" are as follows:

Zone A. Things on which I have authoritative knowledge.

Zone B. Things on which I am not sure of myself as an authority but feel I should be an authority.

Zone C. Things which are so far from my personal experience and responsibility that I feel free openly to confess a lack of knowledge.

An individual will speak freely and positively of things on which he feels he is an authority. Most of us insist upon demonstrating our knowledge, ability, and special accomplishments. In any case, very little urging is necessary to get an individual to talk about those things which he feels he really knows and of which he has a sense of personal mastery and proprietorship. It provides an additional opportunity to express the "I want to be" instinct. As a matter of passing interest in this connection, it is worth while to note how often an individual who is not particularly in favor of some project or idea changes his viewpoint toward it after he has worked on it and in so doing contributed something of himself to it, with the resulting feeling of proprietorship that develops. In fact, many wise supervisors use this principle when they assign people to check up on or review jobs or items of work that they have opposed. The resulting study will usually result in suggested changes or corrections if the plan is at all workable. Once having contributed to the project the former opponent quite often becomes its most ardent proponent.

No one likes to stick his neck out or be put in the position of failing to fulfill a responsibility. Such failure directly affects our standing and security. It involves the "I want" feature. As a result, we hesitate to express an opinion on things which we feel we should know but doubt our knowledge. We are not willing to admit failure to possess what we should have. We bend every

effort to bring our knowledge up to a Zone A status. A good illustration of such a situation would be an electrical engineer who has just returned to the job after a six months' assignment on work that had no relation to his specialty. His knowledge on his specialty has become somewhat dulled and, in addition, new ideas have developed. As a result, he would be very cautious in a conference with other specialists until he was sure of himself. People who are in Zone B do a lot of listening but express few opinions until they feel they have reached the stage of authority. Zone B will, of course, also include individuals who have been and still are responsible for the type of item under discussion but who may be aware that they have not really mastered certain

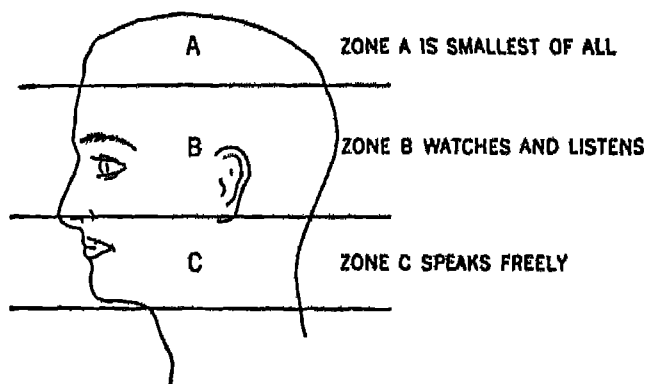


FIG. 7.

phases of it. In these cases the individual is not regaining his position as an authority when he reaches Zone A but is achieving it for the first time. In addition, people who apparently are Zone A at the start of a discussion may find that there are some phases of it upon which they are Zone B and during the discussion pass through a period of Zone B while their ideas and conceptions are being adjusted.

We do, however, feel very free to talk about things for which we cannot be held responsible. If we know that everyone in the group about us is aware of our lack of detailed experience and responsibility, we feel sure that it will not hurt us to express our thoughts and we sense the eagerness of those who are authorities to acquaint us with the knowledge we lack. Thus those in Zone C will talk and speak freely.

Figure 7 forms a graphic illustration of the three zones of knowledge. As you will note, Zone A is represented by the part of the head above the eyes and ears and is the smallest. It represents the facts we have in our minds and really know with respect to the subject under discussion. Zone B represents that section of the head which includes only the eyes and ears, for those in Zone B are careful to keep their eyes open and do a lot of listening until they have accumulated the facts they need to gain or regain their position as an authority. Zone C is quite aptly shown as the part of the head which includes the mouth for people in this zone of knowledge are only too willing to talk.

THE CONFERENCE DEFINITION AND SHIFTS IN ZONES OF KNOWLEDGE

The zones of knowledge with respect to any subject do not stay fixed with an individual but change as his status with respect to it changes. It is the function of group discussions and conferences which achieve group acceptance of a viewpoint or conclusion through an oral interchange of thoughts and reactions to bring all group members up to Zone A. Thus the value in group discussion comes from the knowledge of those in Zones C and B changing to A as a result of it.

Fortunately, people in both Zones A and C are willing to talk and, if we can induce those in Zone C to ask questions and have them answered by those in Zone A, the ones in Zone B will be able to secure the information required to put them in Zone A, as will be indicated by their eventual participation in the discussion. Through their gradual realization of a responsibility for participation in the decision and the approval of it given by their acceptance, Zone C people pass through B to A, although in some instances their Zone B period is briefer as a result of the ideas gleaned from the general discussion.

Let us again revert for a moment to our last stated definition of a conference and see how what we have just discussed relates to it. We can now define a conference as follows: *A conference is an oral interchange of thoughts and reactions to achieve group acceptance of a viewpoint through shifts in the zones of knowledge of individual members of the group.*

One conclusion which we cannot escape, since it is so pointedly brought out by our discussion, is that the objective of conference

leadership technique or methods is to secure zone shifts in the individual group members' distribution of knowledge. Furthermore, a little reflection will show that, to some minor degree at least, this is true in any of the five types of meetings which we are considering. It is impossible to achieve group acceptance of a conclusion without it.

As we shall discover later, the means which the conference leader uses to secure this shift in zone knowledge vary a great deal with the purpose of the meeting. This in turn determines the function of the leader, which is different for each of the five types of meetings. As we have discussed, many leaders unwittingly select and use the wrong method of obtaining zone shifts for the particular type of meeting they are conducting.

What we have just discussed gives added emphasis to our previous conclusion that the developmental type of conference (Type 4 meeting), in which the leader's function is to guide and shape the discussion with the group setting up the procedure to be followed, calls for the greatest degree of skill on the part of the conference leader. In later chapters, we shall investigate the rules and methods to be followed by the leader in his actual conduct of meetings.

INFERIORITY AND RESENTMENT

Any discussion of the two primary or fundamental urges from which all of our thoughts, actions, and reactions spring would be incomplete and bereft of full significance if we failed to cover what is generally termed "a sense of inferiority." In our discussion of it as it relates to conference leadership and consequently the day-to-day leadership which is an inherent part of supervision, we are not considering the extreme manifestations of mental cases of this type. It goes without saying that the average supervisor is not equipped to handle the occasional mental case with pronounced manifestations of inferiority. We are concerned only with those passing feelings of inferiority and resentment that may be inspired through casual remarks or acts by a leader or supervisor.

Care must always be taken not to set up, deliberately or involuntarily, a feeling of inferiority on the part of an individual conference member or a group. To do so deliberately is inexcusable; to do so involuntarily is regrettable and often just as

detrimental to the group's or individual's reactions as though it were deliberate. A leader must always strive to handle the group in such a manner that he does not make his leadership appear to be merely a vehicle for displaying his own cleverness and ability. Whenever a feeling of inferiority is set up, resentment is bound to result because at least one of the two primary urges is throttled. Resentment is particularly pronounced in instances where one's ability to do one's job satisfactorily is involved as this affects the "I want" urge by throwing doubt on competency with a resulting effect on possible pay increases, promotions, or standing with the boss. It is quite possible for a single instance to put a damper on the "I want to be" instinct as well.

The phase of the inferiority problem which many of us fail to recognize and take steps to counteract is what we shall term "inspired inferiority." We forget that the ability of one individual to solve a problem correctly with very little delay may inspire a feeling of inferiority in a conscientious, hard-working employee who has struggled to arrive at a solution, only to find it unsatisfactory. He probably senses that his solution is incorrect when he presents it to the boss; when the correct solution is found with seeming ease and simplicity of thought and action, his involuntary reaction may be, "I sure am dumb not to figure that out myself." Many brilliant men have found that one of their major problems has been to make their ideas and decisions apparent to others in such a subtle way as not to inspire an involuntary feeling of inferiority through comparison. The often quoted axiom attributed to Alexander Pope that "men should be taught as though you taught them not" applies with equal force to the control and guidance of conference discussions and day-to-day supervision. The conference leader must always handle himself in such a way that he does not inspire a feeling of inferiority in any of the group members.

The most respected and well-liked superintendent will always be the one who has the ability to make corrections and suggested changes in the work of subordinates without inspiring a feeling of inferiority. Such a man will listen to the plan advanced and then, through discussion and drawing out the employee's ideas, deftly insert questions and remarks which will inspire the employee to advance as his own ideas the desired changes or

corrections as well as the deficiencies in the proposed plan. This procedure is an application of the same general rules we are developing for use in conference leadership. There is nothing more fascinating to watch than the skillful use of this supervisory device by an able supervisor or conference leader. This one characteristic often forms the line of cleavage between those executives, superintendents, and supervisors who have the full respect and confidence of their men and those whose ability is likewise unquestioned but grudgingly admitted.

A supervisor can check on his tendency to inspire inferiority by a simple test question. At the end of a discussion with an employee, do I usually say, "Let's try it; I believe *my idea* will work out O.K.," or do I ever use the words "*our idea*" or "*your idea*"? Mere substitution of pronouns will not mean anything unless the supervisor's handling of the situation really justifies it, for an individual reacts unfavorably to unwarranted flattery which inspires inferiority. The most effective action is to let the employee feel the supervisor's sincerity and pleasure. Sometimes the supervisor's, or, in conferences, the leader's attitude makes this sincerity apparent and few words are required. Unless the handling of the situation has been such that the employee has been inspired to advance the ideas and corrections as his own, the final phrasing of "*your idea*" cannot be used. A boss who uses this simple rule will not make the serious mistake of always winnowing the grain and leaving merely the chaff for those in his group.

It goes almost without saying that those individuals who happen to be momentarily in Zone *B* are most susceptible to a sense of inferiority. This results from their feeling of responsibility as authorities on the subject and their lack of assurance as to the reliability of their information. The conference leader must always be tactful in directing questions to those in Zone *B* and must take care not to put them on the spot or to force them into a position which may later be proved erroneous. Zone *A* and Zone *C* people are the ones who are in the position to take it.

SAFEGUARDS AGAINST INSPIRING INFERIORITY

Experience will develop in the conference leader an ability to size up and judge an individual's susceptibility to impressions

of inferiority. Some individual's ego veers in the other direction entirely and they involuntarily reject any impressions of inferiority which might try to force themselves into their consciousness. Such people do not require as careful handling as those who are more susceptible to what we have termed "inspired inferiority." The conference leader and the supervisor will do well to observe the indications of people's susceptibility to inferiority reactions and be guided by them.

One of the best safeguards against inspired inferiority is to look first for what is acceptable. After balancing what is acceptable against the unacceptable, it is possible to attack the problem of correction intelligently. One of the involuntary major errors in day-to-day supervision lies in the supervisor's acquiring the reputation for always reacting unfavorably towards everything, as a result of looking at only the unacceptable or unsatisfactory things first. This cannot help setting up on the part of the other person a sense of having to overcome opposition, whereas viewing the acceptable first gives a favorable reaction, even though in the end the over-all project requires radical change or revision. Much can be done to prevent both direct and inspired feelings of inferiority merely by adjusting our viewpoints. The conference leader or supervisor who feels that he must find something wrong to justify his discussion starts out with two strikes already called against him.

A conference leader must also remember that a distinct feeling of inferiority will be felt by the group members if he fails to see that they all participate in the conference discussion to a reasonable degree. There is nothing so blatantly depreciating as being ignored and, as we shall find, a leader must always see that sufficient participation to assure acceptance is experienced by all group members. The feeling of inferiority which results from being the forgotten man in a conference is closely akin to that horror of every employee, the boss who calls him into his office and then proceeds to ignore him by continuing to read or write or give his attention to something else while the employee is presenting his story. Failure to make it clear whether an employee is to leave the room or remain after he has given the desired information is just about as embarrassing as being ignored throughout a conference session. Inferiority and resentment cannot help following such treatment, which in the majority

of cases is pure thoughtlessness and not intentional. Courtesy and consideration are always in order and particularly so in the dealings of a leader or supervisor with the members of his group.

FACTORS IN GROUP CONCENTRATION

One type of involuntary mental reaction can obstruct and confuse the group's progress toward its conclusion, and at the same time give the leader a great deal of difficulty unless he is conscious of how to counteract it. This difficulty arises from the fact that all individuals cannot maintain a high degree of uninterrupted concentration for the same period of time or for long periods of time. The length of time that a person can keep his interest and concentration at a high level varies with individuals. Unless the leader definitely and consciously provides a reasonable number of "break features" in the discussion during which the group may all mentally relax at one time, the individual group members will be dropping out mentally for short periods during the discussion. Thus, when an individual's interest flags momentarily, he may miss the very idea or reaction which he needed; this gap will have to be filled in later, causing the discussion to revert to a previous stage. These "break features" are not the same as definite conference recesses which, of course, also have to be provided. They are in the nature of illustrative stories, experiences, or side remarks by the leader or group members. They are the type of thing discussed in Chap. XII, *Desirable Traits and Characteristics of a Conference Leader*, under the heading of humor. These moments of relaxation must be kept well in hand and controlled by the leader so as to serve his purpose without giving the group the impression that any one of them can break in and tell a funny story at any time.

Since individual group members would be dropping out mentally at varying times, the only wise thing for the leader to do is to provide these breaks so that the group will tend unconsciously to relax and drop out all at the same time. It is difficult to set any definite period of time, since the breaks must be provided when the opportunity offers at natural points in the discussion and cannot be given in the middle of important items. Actually, the leader is faced with the problem of providing them only when necessary, since the variations in the dis-

cussion itself often provide momentary breaks and opportunities for mental relaxation.

Since acceptance develops from the involuntary mental reactions as discussed in this chapter, they will have much to do with the formation of our leadership technique. Acceptance of the viewpoint reached by the conference group cannot be attained unless we adhere to the rules derived from the ways in which people react because it is impossible for us to change them. Without acceptance there is no conference.

INDEX TO DIAGRAM

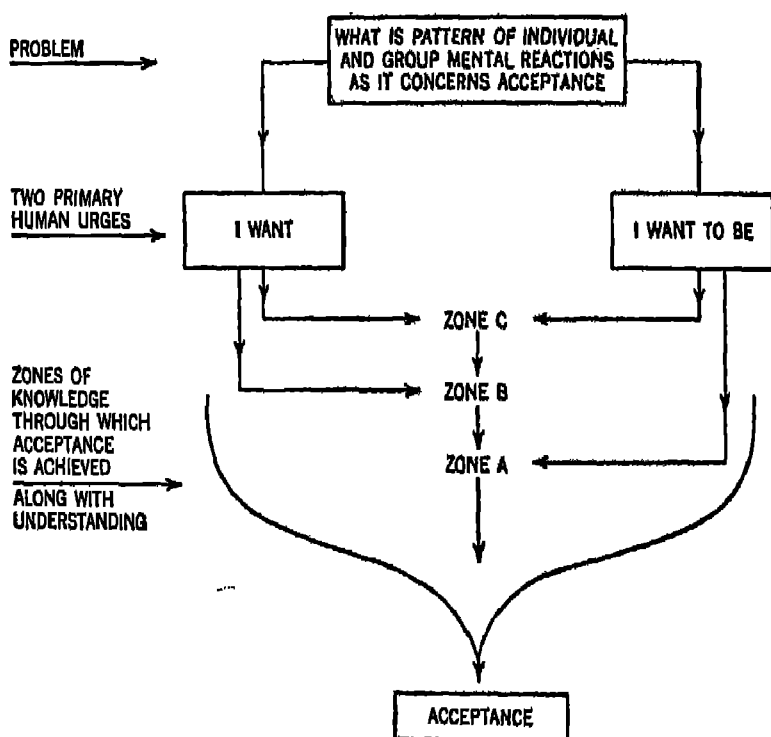


FIG. 8.—Flow diagram summarizing Chap. V.

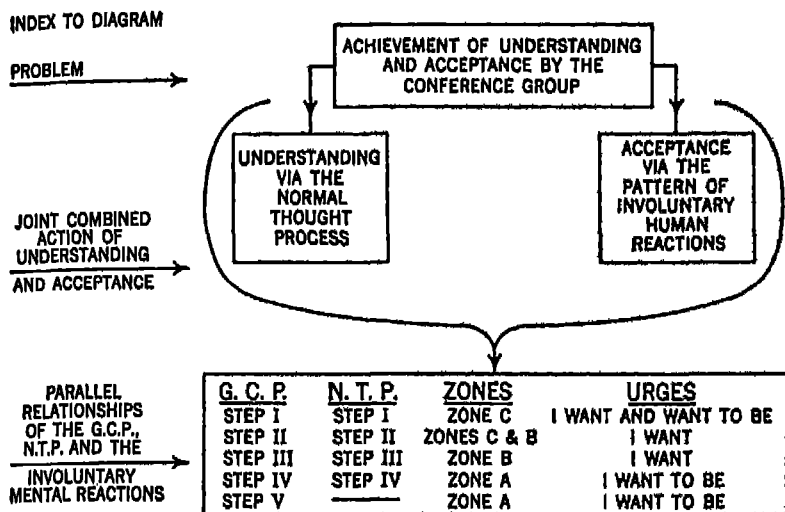


FIG. 9.—Flow diagram showing the joint coordinated achievement of understanding and acceptance in the General Conference Process.

TRUE-FALSE QUIZ

- | | True | False |
|---|-------|-------|
| 1. There are two primary, basic urges from which all our thoughts and actions originate. | _____ | _____ |
| 2. Our first urge is to play the magnanimous benefactor to our fellow human beings. | _____ | _____ |
| 3. The instinct for self-preservation is secondary to our desire to inflate our ego. | _____ | _____ |
| 4. Anyone's knowledge of a particular subject can be placed in one of three general classifications. | _____ | _____ |
| 5. Things which are so far from my personal experience and responsibility that I feel free openly to confess a lack of knowledge are in Zone A. | _____ | _____ |
| 6. Things on which I have authoritative knowledge fall in Zone B. | _____ | _____ |
| 7. Zone C covers things on which I am not sure of myself as an authority but on which I feel I should be an authority. | _____ | _____ |
| 8. I will speak freely and positively on things on which I feel I am an authority. | _____ | _____ |
| 9. I keep my mouth shut and my ears open when I am not sure of myself but feel that I ought to be an authority. | _____ | _____ |
| 10. If I feel I can't be held responsible as an authority I talk readily. | _____ | _____ |
| 11. Zones of knowledge on any subject do not stay fixed with an individual but change during the discussion. | _____ | _____ |

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	True	False
12. The object of a conference is to bring all group members up to Zone A.	_____	_____
13. By getting those in Zones A and C to talk, those in Zone B will acquire information necessary to put them into Zone A.	_____	_____
14. Zone C people never pass through Zone B in getting to A.	_____	_____
15. We must add the phrase "through shifts in the zones of knowledge of individual members of the group" to the conference definition we set up in previous chapters.	_____	_____
16. A conference leader's technique does not have to provide for getting shifts in zones of knowledge.	_____	_____
17. It is impossible to obtain group acceptance of a conclusion without obtaining shifts in the zones of knowledge of the members of the group.	_____	_____
18. The methods used by a leader to get shifts in zones of knowledge are the same regardless of the type of meeting.	_____	_____
19. For a leader to set up a feeling of inferiority in a group member is inexcusable.	_____	_____
20. A feeling of inferiority always results in resentment.	_____	_____
21. Inferiority and frustration cause the same reaction because fundamentally they are one and the same thing.	_____	_____
22. Inspired feelings of inferiority are always recognized by everyone concerned.	_____	_____
23. The phrase "men should be taught as though you taught them not" is a good guide for supervisors and conference leaders.	_____	_____
24. It does no harm if a conference leader occasionally lets the group know that he is smarter than they are.	_____	_____
25. The most respected supervisor or leader makes corrections and changes in the work of his subordinates without setting up a feeling of inferiority.	_____	_____
26. The good leader uses the words "my idea" much oftener than "our idea" or "your idea" in dealing with his group.	_____	_____
27. Flattery is a good supervisory tool.	_____	_____
28. Individuals in Zone B are most susceptible to a feeling of inferiority.	_____	_____
29. A conference leader must be careful in phrasing the questions given to those in Zone B.	_____	_____
30. Those in Zones A and C are in a position to take it without being sensitive.	_____	_____
31. The best safeguard against inspiring inferiority is always to look first for what is acceptable, not for what is unsatisfactory.	_____	_____
32. Much can be done to prevent inspiring inferiority by adjusting our viewpoints.	_____	_____
33. A conference leader must see that all group members participate in the discussion to a reasonable degree.	_____	_____

True False

34. Courtesy and consideration are always good rules to follow if we wish to be on the safe side with respect to inferiority. — —

35. Acceptance cannot be achieved unless the rules based on our involuntary mental reactions are part of our conference technique. — —

Answers: 17, 25, 35, 47, 55, 65, 75, 87, 97, 107, 117, 127, 137, 147, 157, 167, 177, 187, 197, 207, 217, 227, 237, 247, 257, 267, 277, 287, 297, 307, 317, 327, 337, 347, 357.

SUGGESTED EXERCISES AND OBSERVATIONS

1. Review several of your own personal desires, actions, and reactions and classify them as to their relation to the two fundamental human urges. Observe other individuals' actions and reactions and classify them also.

2. When conversing with an individual, a group, or in a conference, try estimating people's zones of knowledge at the start of a discussion. Watch for and note the progress of the Zone C and B people to Zone A. Check your own reactions and instinctive replies when someone asks you a question on which you are in Zone B.

3. Review any recent instances in which you have felt a feeling of inferiority and resentment and decide whether it was direct or inspired. Observe both your own and other people's dealings with those about them or subordinate to them from the standpoint of the possibility of having created a sense of inferiority and resentment. Decide how a poorly handled case might have been handled correctly.

4. Carefully observe those about you at home, at work, and at play and note signs of occasional letdowns in maintaining a sustained high state of uninterrupted concentration. Compare the variations in the length of time that various individuals can maintain their high degree of uninterrupted concentration. Check the effect of it on conference discussion where no break features are provided by the leader.

CHAPTER VI

THE BASIC TYPES OF DISCUSSIONS AND DISCUSSION OPERATION

PREREQUISITES OF THE BASIC TYPES OF DISCUSSION AND DISCUSSION OPERATION

Up to the present time, we have been engaged in building up the general background prerequisite to the formation of a step-by-step conference process and its coordinated leadership technique. We have gained an understanding of the basic types under which all possible meetings can be classified and studied, separated out those types of meetings which are conferences, and investigated the thinking and learning procedures of individuals and groups. The General Conference Process has emerged as a logical, practical procedure consistent with basic human psychology and we have investigated the involuntary mental reactions that will influence the development of the conference leadership technique necessary to its practical application. Before we proceed to extend the General Conference Process into the three conference discussion methods which permit its adjustment to practical problems and the requirements of business and industry, we must devote some time to the basic types of conferences and the two methods through which a group discussion operates.

Through our study of the types of meetings in Chap. II, Meetings and Conferences Defined, we came to the conclusion that there are three types of meetings which are conferences. Type 3, the Informational meeting, Type 4, the Developmental meeting, and Type 5, the Reconciliation meeting are all conferences. Let us briefly restate the purpose of each of the conference-type meetings.

THE TWO BASIC CONFERENCE TYPES— INFORMATIONAL AND DEVELOPMENTAL

The Informational conference has as its objective the imparting or development of certain conclusions or information for the

group and the achievement of group understanding and acceptance of them. The leader, rather than the group, is the controlling authority although individual group members may be authorities or have Zone A information on all or some special phases of the subject matter. The chief distinguishing feature of this type of meeting lies in the fact that the information is supplied to the group or developed for them by the leader or, in certain special cases, by specialist members of the group. In it, the leader enters the conference with definite ideas and conclusions in mind which he desires to have the group reach, understand, and accept. In the typical Informational conference, he may even impart the information on the same general basis as a teacher gives a lecture and then check understanding of what has been imparted through directed discussion similar to that used in recitation. The Informational conference goes a step beyond the mere imparting of the information and checking understanding as in classroom instruction since the leader seeks the reactions of the group and their acceptance of the conclusion reached. It is obvious that this is the type of conference meeting which must be used in cases where the leader has information which the group does not have, *i.e.*, the leader has Zone A information but there are no Zone A group members.

It must be kept in mind that we are discussing the typical Informational type of conference which runs true to type throughout the discussion. In actual practice, a conference may be a combination of the Informational and the Developmental types and fall somewhere between them on the diagram showing the types of meetings in Chap. II. We are at present engaged in establishing clear-cut pictures of the basic conference types, for without them we will be unable to analyze properly the practical conference which is often a combination of them.

The second type of conference meeting, the Developmental, has as its basic characteristic feature the fact that the conclusion or procedure to be followed is developed by the group with the leader taking no part in the discussion as an authority or contributor. As will be recalled, in this type of conference the expectancy of complete group acceptance is 100 per cent since it presupposes the development of the conclusion or procedure by the group and the gaining of such participation and adjustment as is necessary to give 100 per cent group acceptance regardless

of the time required to do it. Of course, in conference-type meetings as well as in any other type of meeting, such as in classroom instruction, the expectancy of gaining complete understanding and acceptance is predicated on the assumption that all group members have average, normal intelligence. If this is not so, it is possible to have groups in which it would be difficult, if not impossible, to achieve anything approaching 100 per cent understanding and acceptance. Furthermore, this basic type of conference rules out those discussions which involve the adjustment of differences, for Reconciliation is the third and final basic type meeting.

The Reconciliation type of conference meeting, as the name implies, is concerned with the reconciliation of differences in the sense that the individual group members have fixed viewpoint and standards from which they may not deviate as the result of purely personal feelings, logic, or convictions. The position taken by them represent interests which it is their duty to serve and from which they must not waver nor accept compromise unless it is a matter of necessity to salvage what they can of their objectives. The initial understanding and acceptance achieved in this type of conference meeting is the realization on the part of individual group members that, without compromise and adjustment, no decision can be reached. If possible, each wishes that his particular desires are imposed on the others. Again we are discussing the clear-cut, true-to-type example.

Close inspection of the Type 5 meeting, the Reconciliation conference, shows that the situations and problems encountered in it will consist of the various group members acting as authorities on their own particular interests and conveying them to the group on an informational basis as specialist, Zone A people. This is, of course, done under the control and guidance of the leader who, in this type of conference as in the Developmental, does not contribute his own viewpoints or act as an authority. As we can see, this stage of the Reconciliation type of conference meeting is identical with that part of the Informational conference in which specialist Zone A group members may contribute information to the group. Following their contribution and the drawing-out discussion necessary to gaining understanding of them, the leader attempts to reconcile the conflicting interests through developmental conference discussion.

achieve a conclusion or decision. Thus we see that the Reconciliation type of conference is actually accomplished through the dual use of the two preceding types; it gains its standing as a separate, distinct basic conference-type meeting only because its members are not open to acceptance of convictions based upon their own personal reactions, reasoning, and logic.

For the purposes of our future discussion and treatment of conferences, we shall consider only two basic conference-type meetings, the Informational and the Developmental. It is from these two that we shall derive the three conference discussion processes based on the General Conference Process.

CLARIFICATION AND DEFINITION OF "DISCUSSION"

Before we can proceed further with the application of the two basic types of conference meetings as they relate to conference discussion processes, we must take time to clarify and define our future use of the word "discussion." It has often been said that one of the drawbacks of the English language is the multiple meanings and usages which are accorded so many words. This necessitates constant vigilance to reduce misunderstandings, for a word may be used with more than one meaning or shade of meaning within the same chapter and sometimes within the same paragraph. In Chap. II, we found it necessary to comment upon the dual use of the word "meeting" which is made in this book in the same way as it is now necessary to define our intended use of the word "discussion." In a purely dictionary sense, the word "discussion" has at least three possible meanings. It is defined as the act of exchanging reasons, examination by argument, and disputation. For our purposes, the first one, the act of exchanging reasons, is the one from which our usages spring.

As we have defined a conference, it applies to the attainment of an acceptable group conclusion with respect to a particular subject or, as we shall term it, "major objective." During the course of a conference-type meeting, a series of conferences takes place on the various subjects to be considered. Each of these conference conclusions on a particular subject is reached as the result of the discussion of the minor divisions or objectives which compose the major objective or subject. The group discusses each of these minor objectives and reaches an acceptable con-

clusion with respect to each, thus accomplishing the over-all conference major objective. In actuality we find, therefore, that each conference is made up of little individual conferences within it and these individual discussions may take the form of either an Informational type conference or a Developmental type. The over-all conference, as it relates to the major objective or subject, takes its character from the basic conference type of meeting which predominates.

We shall use the word "discussion" to describe the consideration of a minor objective which may be either Informational or Developmental in nature. Our use of the word "discussion" restricts it to the method of conducting or carrying on the discussion of a particular single item rather than to the whole conference itself. Very often, we shall use the two words "conference discussion" together and, when used in this way, they still carry the same definition and usage we have outlined.

METHODS OF DISCUSSION OPERATION— OVERHEAD AND CLOSELY SHAPED

Now that we have established the two basic types of conference discussions, we may turn to the consideration of the two fundamental methods of carrying on a discussion. Both the Informational and the Developmental conference discussions may be carried on in either of two ways. These two methods of discussion operation are the overhead and the closely shaped. In the overhead method the discussion of a particular item which has been brought up by the leader takes place between group members, short-circuiting the leader. It is a general group discussion with members participating at will. In the closely shaped method the leader keeps direct control by asking the questions, designating an individual to reply, and then tossing the discussion to another individual for answer or comment. In the closely shaped method all the traffic, so to speak, passes through the conference leader who regulates it. This is the exact opposite of the overhead method in which the leader allows the group members to participate at will after the discussion has once been started.

The overhead method of discussion operation is not intended to be economical of time, and time is no factor. It is highly

susceptible to gradual digression from the subject at hand to something only slightly related to the topic or, in some cases, to material which has no relation to the original topic. Its chief characteristic is its spontaneity and the sense that it gives of the group being in control.

The closely shaped method of discussion operation is easily kept on the beam by the leader, since everything considered passes through his hands. He can rule out the irrelevant and, by rewording and rephrasing what is offered, clarify it. Figure 10 shows the paths which a discussion would follow in both the overhead and the closely shaped methods of operation.

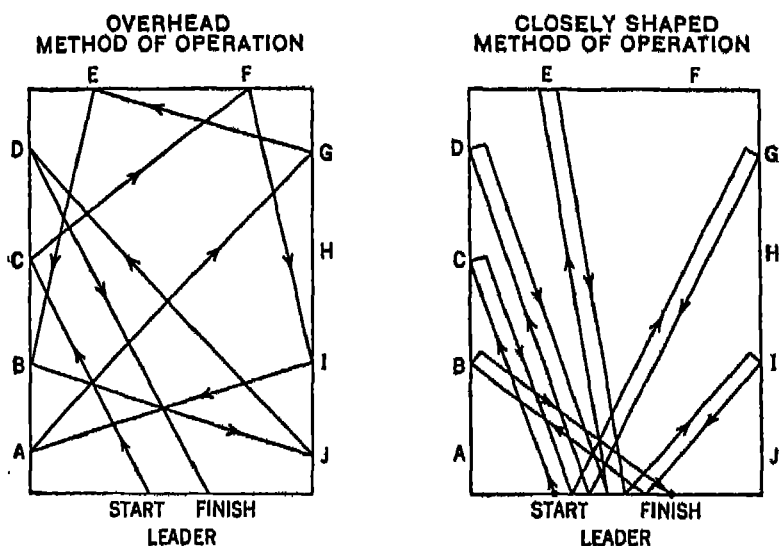


FIG. 10.

METHODS OF DISCUSSION OPERATION AS AN AID TO GUIDANCE

When a discussion conducted on an overhead basis has wandered astray or is about to do so through its digression into slightly related subject matter, the leader, by stepping in and changing to a closely shaped method of operation for a short time, can bring the discussion back on the subject. He can afterward permit the discussion to operate on an overhead basis if he so desires. In actual practice, the method of operation will change

quite often during the course of the discussion. The overhead method of operation finds its greatest field of use in Step II, the Drawing Out stage of the conference discussion, for Step I, Approach, Step III, Acceptance, and Step IV, Summation, always require some shaping by the leader in order to reach definite conclusions. Even though it were possible to have practically all of Step II handled on an overhead basis, some shaping by the leader would still be necessary to ensure participation by all group members, since there is a natural tendency for Zone A and Zone C people to do most of the talking. In addition, there will be among the members of any group some who are naturally fluent and tend to jump in while the less fluent and retiring group members would contribute very little. Sufficient participation by all group members to ensure zone shifts is necessary.

Contrary to a somewhat widely accepted impression, the closely shaped method of operation does not necessarily limit the contributions by various group members nor restrict their participation. The fact that all contributions are passed through the leader should not affect the spontaneity of the discussion if the leader performs his function in a natural, helpful manner. Even when time is a definite factor in a discussion, every effort should be made to keep it on as natural a basis as possible. Part of the secret of effective closely shaped handling is to allow a small amount of overhead operation when it is the natural, instinctive outlet for the group. In fact, it is impossible to prevent it without tending to kill the discussion when an individual makes a quick instinctive reply to something said by another group member before the leader can apply close shaping. Later we shall find that even in the extreme, clear-cut Informational type of conference discussion there is bound to be a limited amount of overhead operation.

Earlier in this chapter it was pointed out that in the strictly Developmental conference type of discussion, time is not a factor, as the expectancy of 100 per cent group acceptance demands full, free, open discussion. From this it is evident that its use in practical everyday business conferences must be restricted to those cases where full group acceptance is essential. Thus we can see that a Developmental type of con-

ference discussion in which overhead handling predominated would not be indicated if time was a factor. However, the majority of the benefits of Developmental conference discussion could be retained if a closely shaped method of operation predominated. Sometimes, as we shall find, Step I of the General Conference Process is conducted as an Informational discussion with closely shaped operation with Step II, Drawing Out, Step III, Acceptance, and Step IV, Summation, being conducted on a Developmental basis with closely shaped handling. Through such a combination as this, time can be saved and yet the predominant over-all conference on that subject will still be Developmental in nature with closely shaped handling.

The Informational type of conference discussion uses both the overhead and the closely shaped methods of discussion operation. However, the closely shaped method of operation predominates, for the overhead operation is limited to occasional use by the leader mainly for the purpose of giving an air of spontaneity and group control to the discussion. It will, of course, appear from time to time when one group member replies to another in an offhand, involuntary manner before the leader has time to shape the discussion. On such occasions no harm is done, for it is a natural thing for one member to reply to another when he is particularly interested. Depending upon the situation, the leader can step in and change the method of operation back to closely shaped without delay, or, when the trend is in the right direction, permit the overhead to continue for a period of time.

Closely shaped operation will predominate in all the five steps of the General Conference Process when an Informational conference discussion is used. The greatest tendency for the group to use an overhead method of operation will usually be experienced during Step II, Drawing Out, and Step III, Acceptance.

As has been brought out previously, conference discussions seldom adhere strictly to one type throughout their complete course. Their general over-all nature is determined by the predominance of the Developmental or the Informational type of discussion. Thus, in describing a particular conference, we would say that it was Developmental or Informational in nature, or that it fell somewhere between the two with a definite leaning toward one or the other.

The flow diagram summarizing the essential points that we have covered in this chapter shows in a graphic way the relationships that have been brought out. Although it would be impossible to include all the details in such a diagram, this is of no consequence since, through its simplicity, the diagram shows only the relationships between key ideas.

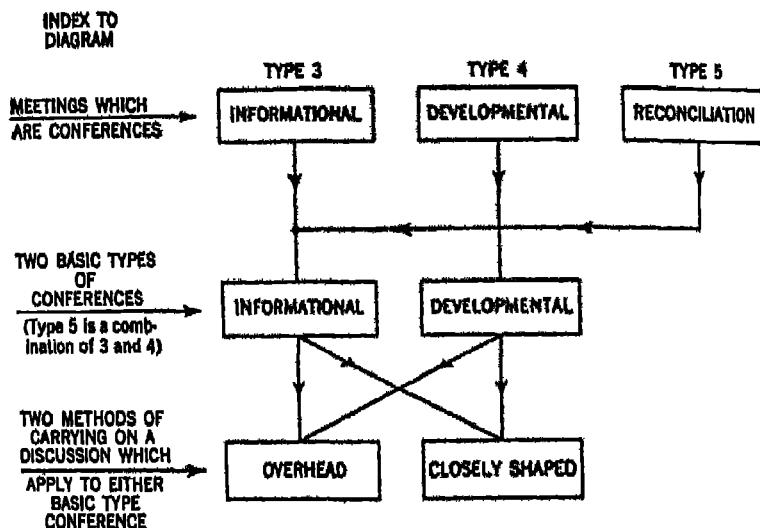


FIG. 11.—Flow diagram summarizing Chap. VI.

COMPLETION QUIZ

Write in missing words

1. The General Conference Process can be extended into _____ specific conference discussion processes to permit its adjustment to practical problems.
2. A group discussion _____ through one of _____ methods.
3. The three types of meetings which are conferences are the _____, the _____, and the _____.
4. The _____, not the _____, is the controlling authority in a Type 3 meeting.
5. The _____ sets up the procedure or conclusion in a Type 4 meeting, and expectancy of _____ is 100 per cent.
6. In the Type 5 meeting, the objective is the _____ of _____.
7. The Reconciliation type of conference is actually accomplished through dual use of the _____ and the _____ types of conferences.

8. From a standpoint of basic principles, there are only two basic types of conferences, the _____ and the _____.

9. The _____ specific conference discussion processes are derived from the _____ basic types of conferences.

10. In a purely dictionary sense, the word _____ has three possible meanings or definitions.

11. As we shall use the word "discussion," it means "the act of _____ reasons."

12. The basis for the acceptance of a major objective (conference subject) is attained through the discussion of each of the _____ making up that major objective.

13. A conference is a _____ of little conference discussions _____ the conference itself.

14. The _____ conference as related to the major objective takes its _____ from the basic type of conference meeting which predominates in handling the minor objectives.

15. The word "discussion" is used to describe the consideration of a _____ or _____ objective rather than the series of conference discussions which make up an over-all meeting.

16. The two words "conference discussion" have the same definition and usage as the word _____.

17. Both the Informational and the Developmental basic conferences may be carried on in _____ of _____ ways.

18. The _____ methods of discussion operation are the _____ and the _____.

19. In the _____ method of operation, the discussion goes on between _____, short-circuiting the _____.

20. When the _____ method of operation is used, the _____ keeps direct _____ of it.

21. _____ is not intended to be economical of time and is highly susceptible to going _____.

22. All traffic passes through the _____ when _____ operation is used and the discussion is easily kept on the beam.

23. In actual practice, the _____ of _____ will change quite often and take its over-all character from the type that _____.

24. Overhead operation predominates in the _____ type of basic conference.

25. Step IV, _____, of the General Conference Process usually requires _____ operation.

26. Contrary to general impressions, _____ operation does not have to limit participation.

27. The secret of effective, natural closely shaped operation is to allow a small amount of _____.

28. It is impossible to prevent all _____ without killing the spontaneity of the discussion.

29. The use of the _____ type of basic conference is restricted in everyday business conferences.

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30. There are _____ basic types of conferences which can be handled by either _____ or _____ operation.

Answers: 1. three, 2. operates, two, 3. Informational, Developmental, Reconciliation, 4. leader, group, 5. group, acceptance, 6. reconciliation, differences, 7. Informational, Developmental, 8. Informational, Developmental, 9. three, two, 10. discussion, 11. exchanging, 12. minor objectives, 13. series, within, 14. over-all, character, 15. major, minor, 16. discussion, 17. either, two, 18. two, overhead, closely shaped, 19. overhead, group members, leader, 20. closely shaped, leader, control, 21. Overhead operation, satiray, 22. leader, closely shaped, 23. method, operation, predominates, 24. Developmental, 25. summation, closely shaped, 26. closely shaped, 27. overhead operation, 28. overhead operation, 29. Developmental, 30. two, overhead, closely shaped.

SUGGESTED EXERCISES AND OBSERVATIONS

1. Select conversations and discussions at random and classify them as to whether they are developmental or informational in type. Note how the nature of the discussion changes with variations in the subject or item discussed or shifts in the zones of knowledge of the participants.

2. Listen to a group conversation or discussion and check whether it is operating on an overhead or a closely shaped basis. Watch the changes from one method of operation to the other as the discussion progresses. In a fortuitous group discussion without a designated leader, note how at times one person tends to dominate and shape the discussion and how at other times it is purely overhead operation without a leader but still sometimes progresses to a conclusion with undetermined acceptance.

3. Deliberately start a group conversation on a particular subject and see if you can guide it to a conclusion on a Developmental conference discussion basis using the five-step General Conference Process without making it too evident that you are shaping and guiding the discussion. Allow overhead operation to a sufficient degree to counteract your periods of closely shaped operation. Such trials are often difficult but interesting and instructive. Note how overhead operation is a natural group outlet.

4. Select a subject on which you are an authority and repeat 3 on an Informational conference discussion basis. Use closely shaped operation as much as possible.

CHAPTER VII

THE THREE SPECIFIC CONFERENCE DISCUSSION PROCESSES

DISTINCTIONS BETWEEN CONFERENCE DISCUSSIONS AND CONFERENCE DISCUSSION PROCESSES

The General Conference Process was developed and defined in Chap. IV as the step-by-step procedure by which any conference discussion may be handled. As we will recall, the five steps of this General Conference Process are necessary to any conference discussion. The specific conference discussion processes that we shall develop in this chapter will include these same five basic steps and will differ from the General Conference Process in that the handling of the five steps will be varied to meet the requirements of each specific conference process. The three basic conference discussion processes are then merely special applications of the General Conference Process which adjust it to the various requirements of conference work.

In the preceding chapter, we resolved the three conference-type meetings, *i.e.*, the Informational, the Developmental, and the Reconciliation, into two basic types of conferences, since the Reconciliation type was found to be a combination of the other two. Furthermore, we set up a definition and meaning for the word "discussion" as we shall use it and established two basic conference discussions, the Informational and the Developmental. Each has its own definite characteristics and advantages which are the same as those of the two basic types of conferences from which they are derived.

The Developmental discussion has the advantage of having the highest expectancy (100 per cent) of complete group acceptance. However, in order to gain it, no limitations can be placed upon the amount of time required for the discussion. Its chief attribute is that the group itself develops the conclusion or procedure to be followed. Thus the group has to have a reasonable percentage of members in Zone A with respect to the subject

or major objective at the start of the discussion. The leader's function is that of shaping and guiding, not of acting as an authority or of supplying information. The Informational discussion, on the other hand, will not have higher than two-thirds expectancy of complete group acceptance but is much more economical of time, since the leader can serve as authority in addition to shaping, guiding, and controlling the discussion. The distinguishing feature of the Informational discussion is that the leader develops the conclusion or procedure for the group.

Before we proceed further, we must again stop to define the usage which we shall accord the word "process." We have established the usage in a broad sense when we set up the General Conference Process. In the future, whenever we use the word "process," we automatically mean and assume the five-step General Conference Process. Thus by adding the word "process" to the words "developmental discussion," we have the "developmental discussion process" which is a five-step discussion in which the handling given each of the steps is such that the over-all process is developmental in nature. Similarly, the phrase "informational discussion process" describes a five-step discussion in which each of the steps is so handled as to achieve the objective desired on an informational basis.

Summarizing briefly for the moment, we now have at our command for use in conference work two discussion processes, either of which may be used to carry on the discussion of the individual minor objectives or subsubjects which form and are subordinate to the major objective or conference subject. As was pointed out in the last chapter, the nature of the over-all conference discussion is determined by the basic type of discussion which predominates. The same is true in the case of the over-all conference discussion process, for it can be either Developmental or Informational depending upon which type of discussion process predominates.

DESCRIPTIONS OF THE THREE SPECIFIC CONFERENCE DISCUSSION PROCESSES

Under our present setup, we have only two specific conference discussion processes as offshoots of the General Conference Process. This does not give us much flexibility in adjusting the conference discussion process used to the requirements of a

conference. We know, of course, that in a practical way, a particular conference will seldom be completely Developmental or Informational since the discussion process used for each of the minor objectives may be varied to suit the objective desired. Nevertheless, we still have only a choice between the Developmental, in which time is not a factor if the group is to set up the conclusion, and the Informational, if the leader is to serve as an authority and develop the conclusion for the group with a more economical use of time. It would certainly be a distinct advantage if we had an intermediate conference discussion process which retained the advantage of having the group develop the procedure without unlimited use of time, even though there was a possibility that some of the 100 per cent expectancy of complete group acceptance might be sacrificed. A possible lead to such a solution is obtained when we recall the two methods of discussion operation which can be used, the overhead and the closely shaped. If we retained the Developmental discussion principle but used a closely shaped method of handling, restricting the use of the overhead operation, we would achieve our objective of having the group set up the conclusion reached with the time required being held within reasonable limits consistent with the productive standards of business and industry.

Let us, therefore, establish three specific conference discussion processes. The first we shall call the Purely Developmental discussion process and it will retain the same characteristics as what we have termed the Developmental discussion process. The second is the new intermediate process which we shall call the Shaped Developmental discussion process, while the third is, of course, the Informational discussion process which we retain as is. In actuality, we divided the Developmental discussion process into the Purely Developmental and the Shaped Developmental, as is shown in the flow diagram summarizing this chapter.

FURTHER CLARIFICATION AND DEFINITION OF TERMS

We are now ready to investigate the three specific discussion processes, but first we must make sure that there will be no confusion as to the use of terms. In this connection, it will be well to recall that the word "conference" is to apply to an over-all discussion of a single major objective or subject. Thus the term

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"Purely Developmental conference" would mean that the general over-all nature of the conference is Developmental even though the five-step discussion process accorded some of the minor objectives might be Informational or Shaped Developmental. The over-all Purely Developmental conference process for the major objective would have five steps. During Step I, Approach, the group is focusing its attention on the development of the major objective, defining, clarifying, and crystallizing it so that acceptance is obtained as to what is to be discussed. Actually, within Step I at least the first four steps and possibly all five steps of one of the three specific discussion processes will appear. Step II, the Drawing Out step of the over-all conference process, consists of separate discussions of each of the minor objectives or component parts of the major objective. The specific discussion used in each case will vary according to the needs of the minor objectives and in each case the usual conference process steps will be used. Thus we see that, in discussing each of the minor objectives within Step II of the over-all conference process which leads to the acceptance of the major objective, the discussion might take the form of any one of what we have called the three specific discussion processes, *i.e.*, Purely Developmental, Shaped Developmental, or Informational. If the over-all conference discussion is Purely Developmental, obviously, the majority of the discussions would be of that nature. Step III, Acceptance, of the over-all conference process would be concerned with the securing and checking of group acceptance of the major objective while Step IV, Summation, would achieve its crystallization into a statement or conclusion acceptable to the group. Both of these steps would be Purely Developmental discussion processes in the case we have supposed. Step V, Association, would be done by the leader and would knit up and tie in the conclusion reached with respect to the major objective with the other major objectives.

As we investigate and discuss each of the three specific discussion processes, it must be kept in mind that they differ from the General Conference Process only in the way that each of the five steps of the General Conference Process is handled and adjusted to meet the needs of the particular specific discussion process. The number of the steps and their function are the same in the three specific conference processes as in the General

Conference Process, since these are merely specialized applications of it.

THE PURELY DEVELOPMENTAL DISCUSSION PROCESS

A Purely Developmental discussion process is one in which the leader merely guides and shapes the discussion and does not function as an authority. It is a strictly Type 4 meeting and is one of the two basic types of conference discussions. The group develops the conclusion reached. In this specific discussion process, the overhead method of operation would tend to predominate since it is the most natural form of group discussion where spontaneity and the feeling of group control are desired. The leader must, of course, supply such shaping and guidance as are needed to keep the discussion from wandering astray into material of a general nature. As long as the discussion progresses along lines of thought that are directly, closely, or even slightly related to the subject, an overhead discussion is achieving its purpose. However, as we shall see later, the discussion should narrow down into the closely and directly related material as it progresses and goes through the final stages of Steps III and IV, since the proportion of slightly related material is larger in Step II during the Drawing Out part of the discussion. In a Purely Developmental discussion what is known as a casual approach may be made to isolate the subject to be discussed from the general preconference conversation of the group. In Step I, Approach, the leader must do a reasonable amount of shaping and guiding since the group must clearly define what it is to talk about and he alone is aware of the major objective or subject. Although Steps II, Drawing Out, III, Acceptance, and IV, Summation, are Purely Developmental in that the group is the source of all information and decision, the leader does often sum up in a statement the crystallized group conclusion. Although the majority of the individual minor objectives will be handled as Purely Developmental discussions, some of them cannot help being Shaped Developmental and occasionally Informational in nature. Step V, Association, is performed by the leader in all three specific discussion processes, for he has the background as to the over-all relationship between the series of major objectives or conference subjects that make up the meeting or group of meetings.

THE SHAPED DEVELOPMENTAL DISCUSSION PROCESS

The Shaped Developmental discussion process is much more closely directed than the Purely Developmental and the greatest proportion of its operation is of a closely shaped nature. In it the leader still serves chiefly as the director and shaper of the discussion rather than as an authority since the group still is the source of information and decision. The number of instances in which the leader would handle certain minor objectives on an Informational basis or at least contribute information from time to time is much higher than in the Purely Developmental discussion. It is still basically a Type 4 conference discussion since Developmental discussion predominates although the overhead operation is greatly reduced. Sufficient use must be made of overhead operation to give the group the feeling of control which is essential to a basically Developmental discussion. Some of the 100 per cent expectancy of complete group acceptance may be sacrificed in the use of the Shaped Developmental discussion. However, the reduction can be greatly minimized by a skillful leader whose naturalness in handling the discussion gives it the same feeling of spontaneity and group control as is characteristic of the Purely Developmental. Almost without exception, day-to-day business conferences fall into either this classification or the Informational. Failure to recognize this has resulted in the feeling that conference leading methods were not suited to the day-to-day business conference because of the tendency to emphasize the Purely Developmental discussion as the only true conference discussion.

In Step I, Approach, of the Shaped Developmental discussion the leader adheres strictly to the closely shaped method of handling. Through the use of direct questions and statements, he focuses group attention on the subject to be discussed. In fact, the leader may even make an outright statement of the subject for discussion, following it with closely shaped operation designed to clarify the statement and define the usage of any controversial and ambiguous words, thus isolating the topic in such a manner that the group is clearly aware of its scope and limitations. As we have mentioned before, Step I would, in all probability, have within itself at least Steps II, III, and IV of the General Conference Process and in many instances, Steps I and V in addition.

As a result of the Summation of the conference subject, the leader should have a clear-cut statement of it written on the board. In the Summation step, Step IV of the over-all Step I we are discussing, the leader actually phrases into a conclusion the ideas which the group has accepted in Step III and writes it on the board. He does not depend upon group members to form and state the conclusion as would be the case in a Purely Developmental discussion. Care must be taken by the leader to see that in making his statement, he merely clarifies and summarizes in his own words and does not change the meaning nor let his own ideas affect it.

The Drawing Out step of the Shaped Developmental, Step II, also operates on a predominantly closely shaped basis with the overhead method of operation used as required. Of course, the group will occasionally slip into overhead operation when the leader does not intend it to because of a quick instinctive response made by one member of the group to another. There is nothing wrong in this and the leader should not squelch it or he will destroy the sense of group control and participation. However, he should not permit it to run unless he feels that it is on the beam and achieving the objective he desires. In any case, he can tactfully put the discussion back into closely shaped operation by stepping in and indicating a particular individual as the one to carry on.

In the Shaped Developmental Step II, although the leader's function is basically the same as in the Purely Developmental discussion process, his method of handling is different since all traffic goes through him. He must make sure that the necessary shifts in zones of knowledge have taken place since the amount of discussion is more limited and the expectancy of complete group acceptance lower than in the Purely Developmental discussion process.

Step III, Acceptance, as we have found, is peculiar in that much of its groundwork is achieved during Step II as the result of the adjustment in ideas or reactions that takes place as the shifts in zones of knowledge are accomplished. The end of Step II is indicated when it is evident that all group members are approaching or are in Zone A. Step III consists of checking to make sure of group acceptance, and in its most fundamental conception would consist of polling the group members one by

one. Actually this would not be a very desirable nor interesting way of accomplishing it. A series of properly phrased questions or remarks that bring forth expressions of ideas and reactions indicating the various group members' acceptance is much more desirable. Very often it is evident to the leader and the group that full acceptance and understanding have been obtained and it is a matter of making spot checks to be sure that this is so. Step III, Acceptance, is most essential to the conference process since it is through this one vital feature that we are able to make sure that we have achieved a conference rather than another type of meeting. Sometimes a fairly large portion of Step III may be distributed between the gradual adjustment in viewpoints and reactions which takes place as zone shifts in knowledge are accomplished in Step II and the Summation in Step IV. As a result, from a time-disposition standpoint, Step III, Acceptance, may be relatively brief and occasionally practically disappear as a distinct step for minor objectives. Even in such cases where a portion of it is achieved as a by-product of Steps II and IV, the leader must not fail to see that the acceptance has been obtained. In an over-all Shaped Developmental conference discussion process, Step III must always be consciously performed as a distinct checkup.

Step IV, Summation, also operates on a closely shaped basis in the Shaped Developmental discussion with the leader taking much more part in it than in the Purely Developmental. In this type of discussion, the leader frames and makes the summarizing statement rather than having the group develop it. This is economical of time but carries with it the obligation of making sure that the summarizing statement is acceptable to the group. This entails some discussion and adjustment but is not to be confused with the checking of the group acceptance of the basic principles and ideas making up the conclusion reached as accomplished in Step III. All that we obtain in Step IV is group acceptance of the wording of the summarizing statement of the major objective. As has been previously mentioned, Step V, Association, is handled by the leader in all the specific conference discussion processes.

THE INFORMATIONAL DISCUSSION PROCESS

The name of the third specific discussion process is also indicative of its nature. In it the leader acts as an authority and

imparts information in addition to guiding and controlling the discussion. In many instances there is no alternative for its use particularly where the leader has information to impart or where the group does not have the information and background to permit it to develop the conclusion even though that would be desirable. As has been mentioned, the type of discussion process used often varies with each of the minor objectives leading up to and determining the over-all subject conclusion. The use of the Informational discussion is almost automatic even in an over-all Purely Developmental discussion when the group does not have Zone A information. As an illustration, the leader may have new information to impart to the group and uses the first few minor objectives to do so in order to bring them up to Zone A on something unfamiliar to the whole group. He does this before calling upon them to combine the new material with their previous background in the succeeding Purely Developmental discussion. It is still necessary in the Informational discussion to have sufficient discussion to check the shifts in zones of knowledge and provide opportunity for the group members to gain understanding and to adjust their views through oral expression of their thoughts and reactions. We must always keep clearly in mind that regardless of the specific conference discussion used, the same basic objectives remain with respect to shifts in zones of knowledge, adjustment of thoughts and reactions, and group acceptance.

An Informational discussion is also used in an over-all Shaped Developmental discussion process when a minor objective is not of sufficient significance and importance relative to the over-all discussion to warrant devoting much time to it. By using an Informational discussion process, time is saved, as the leader in Step II details the information instead of drawing it out even though some members of the group are Zone A with respect to it. He then achieves his zone shifts, participation, and acceptance through closely shaped operation.

It should be clear that Step I is the same in the Informational discussion as in the Shaped Developmental discussion. However, it is much more often achieved by the use of a simple statement and definition of the subject to be considered, supplemented by sufficient closely shaped operation to gain definition, understanding, and acceptance.

In Step II, Drawing Out, we find that there is a radical departure from the Drawing Out steps used in both the Purely Developmental and the Shaped Developmental discussion processes. In many ways, the first part of Step II of the Informational process is closely akin to the Step II of the teaching-learning process in that the leader is giving out the information on what is almost the equivalent of a lecture basis. This takes the place of the Drawing Out of the information from the group members. The real discussion in the strictly Informational discussion process takes place in Step III, Acceptance, where the group acceptance is checked and the necessary zone shifts accomplished to provide it. In the Informational discussion process, we have a redistribution of emphasis in that part of Step II is accomplished in Step III, Acceptance, where in the Purely Developmental and the Shaped Developmental the conditions are reversed. In the Informational discussion, Step III, Acceptance, must contain sufficient discussion to check shifts in zones of knowledge and actions and reactions of the group so as to obtain group acceptance but it is not unduly prolonged and is predominantly closely shaped in operation.

The most striking and valuable characteristic of the Informational discussion process Step II comes from its ready adjustment to the needs of the everyday business conference. It is a requirement of such conferences, in which a group of specialists or experts get together to contribute their specialized knowledge to the joint solution of a problem that each expert have an opportunity to state and explain the aspects and applications of his special knowledge to the problem. Inability to evaluate clearly such a procedure in terms of the commonly known Purely Developmental conference process has prevented the ready acceptance and use of the principles of conference leadership in day-to-day business conferences.

Step II consists, as we have said, of giving out by the leader where he is the possessor of information not common to the group but necessary to the achievement of a solution. From what we have just outlined, it should be clear that selected specialist members of the conference group may rotate with the leader during the giving out or Step II stage of the discussion process. This in no way means that the leader relinquishes his control of the group since clean-cut, effective leadership is necessary to achieve a sound decision as well as economy of time.

The conference leader must be keenly conscious of what is taking place in Step II of the Informational discussion process, for his handling of each specialist's contribution demands flexibility and adjustment to meet the requirements of each item. Such a Step II is an ideal illustration of what actually takes place in any conference discussion for, as each specialist's contribution is made, the leader must sense the group's reactions sufficiently to determine the extent to which it requires checks of zone shifts, reactions, and acceptance. The group will give indications to guide the leader. Sometimes a contribution is such that, because of previous material and the specialized background, very little discussion is necessary in the Step III covering it, while in other cases, because of the nature of the material or defects in its presentation, a brief clarifying discussion with Summation of it and Association by the leader may be necessary. Thus we see again that in practice the conference process often involves the use of discussions within discussions. Sometimes only a Step II and III are necessary on small subdivisions of the subject or specialist contributions. In other cases, a Step II, III, and IV will be sufficient while in the case of radically new or complex material, Steps II, III, IV, and V are necessary. This in no way changes the need for an over-all Step II, III, IV, and V with respect to the major objective or subject.

USES AND APPLICATIONS OF THE THREE SPECIFIC DISCUSSION PROCESSES

All three specific conference discussion processes are used in both business and training conferences since, as we have discussed, each has a definite field of use as indicated by the purpose, type, and flow of the conference. It must always be kept clearly in mind that, in actual operation, the over-all subject for discussion may be handled primarily as any one of the three specific conference discussion processes with most of the minor discussions taking the same form.

In day-to-day business conferences little use is made of the Purely Developmental conference discussion process as an over-all subject discussion method. In fact, it is used only occasionally in handling some of the minor objectives. Its main disadvantage in the business-type conference is its uneconomical use of time and the high amount of overhead discussion between group members, short-circuiting the leader.

This does not mean that a day-to-day business conference never uses a Purely Developmental discussion method, for many times the conclusion to be reached has to be developed from the group. It does mean that the Shaped Developmental discussion should be used in preference since it uses a very direct Step I or Approach and in addition calls for closely shaped operation in Steps II, III, and IV. Although it is economical of time, when properly handled, it does not greatly reduce the probability of obtaining full group acceptance nor limit the adjustment of zones of knowledge. Its disadvantage lies in its limitation of the free overhead type of group discussion which is highly desirable in some types of parliamentary, creative, and representative groups where a sense of complete freedom of expression is essential.

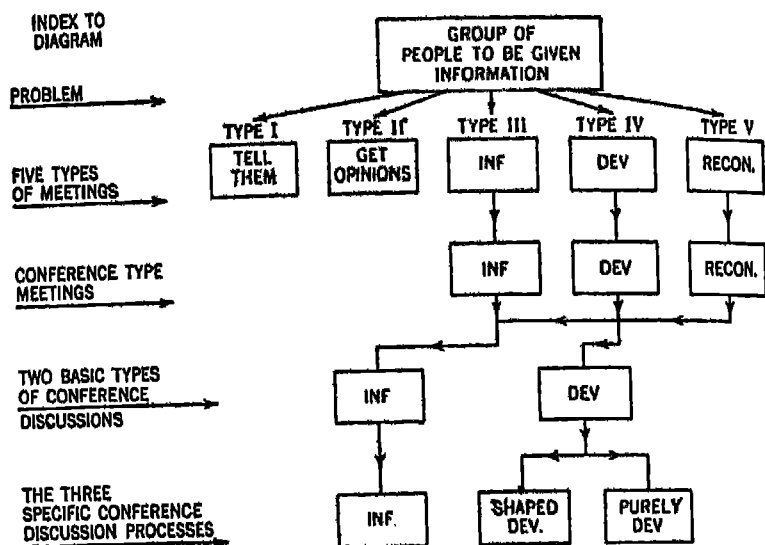
The Informational Conference discussion fills an important place in the day-to-day business-type conference. It provides opportunity for the introduction of information where required as well as acceptance and economy in the use of time.

Experience has shown that the Shaped Developmental discussion process and the Informational discussion process are adapted to everyday business conferences and that in most instances both are used in any particular case, while the conference method as a purely training device calls for the use of all three. It is to be regretted that a lack of appreciation of the proper use and application of the Shaped Developmental and Informational conference discussions has tended in the past to prevent realization of the many benefits of conference leadership as a practical business conference tool. Since business conferences always have existed and always will, as a matter of common sense we should do everything in our power to learn how to handle them if only from the standpoint of economy of time and money for they form the bulk of what is usually called supervisory administrative or executive work. In addition, the by-products such as making the conference a pleasing effortless experience and training how to participate as a conferee are by no means inconsiderable. The following summary of the methods of handling the three specific conference processes should do much to clarify their use and application when viewed in the light of the material contained in this chapter.

Step	Purely Developmental discussion	Shaped Developmental discussion	Informational discussion
I. Approach	Casual approach Overhead operation with closely shaped operation when required to keep on beam	Direct approach Closely shaped operation	Direct approach Closely shaped operation
II. Drawing Out	Leader does not act as an authority—merely guides discussion Overhead operation with only such closely shaped operation as needed to prevent discussion going astray. Zone shifts must be checked	Leader does not act as an authority—merely guides discussion Closely shaped operation with only such overhead as required to give group a feeling of control Zone shifts must be checked	Leader acts as authority and gives out the Zone A information required on a lecture basis* Very closely shaped operation
III. Acceptance	Group acceptance checked Overhead operation as far as possible	Group acceptance checked Closely shaped operation	Zone shifts checked and group acceptance obtained Closely shaped operation
IV. Summation	Summation of conclusion by group with leader's guidance Leader writes conclusion on board Overhead operation when possible, but close shaping required in most cases	Summation achieved by closely shaped operation with leader phrasing conclusion statement. Leader must not inject own ideas or warp group's conclusion in phrasing it	Leader phrases summing-up statement and checks group's acceptance of it Very closely shaped operation
V. Association	Done by leader	Done by leader	Done by leader

*Selected specialists or authorities in the group may be delegated to present their information.

FIG. 12.—Methods of handling the three specific conference discussion processes.



* All three specific conference processes are handled by using the five steps of the General Conference Process adjusting the handling of each step to the needs of the particular conference process used.

FIG. 13.—Flow diagram summarizing Chap. VII.

MATCHING QUIZ

Match the proper letter to each number so as to get complete correct statements.

- | | |
|--|--|
| 1. The five steps in the General Conference Process are | A. an authority as well as guiding and controlling the discussion. |
| 2. We find that the three specific conference discussion processes are | B. of the same type as the over-all discussion of the major objective. |
| 3. Whenever the word "process" is used it means | C. the Shaped Developmental discussion process. |
| 4. By adding the word "process" to "developmental discussion," we have the Developmental discussion process which is | D. the method of handling. |
| 5. In the Informational discussion process each of the five steps is | E. the same as in the General Conference Process. |
| 6. The names of the three specific conference discussion processes are | F. the Purely Developmental discussion process. |
| 7. We divided the basic Developmental conference discussion into | G. the other two specific discussion processes. |

8. "Conference" means
 - H. an authority but merely guides and shapes the discussion.
9. The specific conference discussions used vary with
 - I. all three specific discussion processes.
10. The majority of the discussions of minor objectives must be
 - J. a Type 4 conference meeting and is Developmental in nature.
11. In each of the specific conference discussion processes, the number of the steps is
 - K. the over-all discussion of a single major objective.
12. A Purely Developmental discussion is one in which the leader does not act as
 - L. the Purely Developmental and the Shaped Developmental which gives us the three specific conference discussion processes.
13. Overhead operation tends to pre-dominate in
 - M. merely special applications of the General Conference Process.
14. Step V, Association, is performed by the leader in
 - N. so handled that the desired conclusion is reached on an Informational basis.
15. Closely shaped operation is used a great deal in
 - O. the needs and requirements of each of the minor objectives.
16. The Shaped Developmental discussion basically still is
 - P. the five-step General Conference Process.
17. The leader's function in the Shaped Developmental discussion, basically the same as in the Purely Developmental, differs in
 - Q. the Purely Developmental, the Shaped Developmental, and the Informational.
18. In the Informational discussion process the leader acts as
 - R. basic to any conference discussion.
19. Step II of the Informational discussion process differs radically in its handling from
 - S. a five-step discussion in which all the steps are handled so that the over-all process is Developmental.
20. In day-to-day business conferences very little use is made of
 - T. the Purely Developmental discussion.

Answers: 1R, 2M, 3P, 4S, 5N, 6Q, 7L, 8K, 9O, 10B, 11E, 12H, 13T, 14I, 15C, 16J, 17D, 18A, 19G, 20F.

CHAPTER VIII

HINTS ON HANDLING THE STEPS IN THE CONFERENCE PROCESS

Now that we have seen how the General Conference Process resolves into the Purely Developmental, the Shaped Developmental, and the Informational conference discussions when used to conduct discussions on specific items, we shall look into the technique, or as it is sometimes called, the handling of each of the five steps from the conference leader's standpoint. The details of the leader's technique will be discussed in later chapters, as here we are interested only in the general characteristics of the discussion which takes place in each step of the conference process. Since the General Conference Process merely states the five steps in a broad way, we shall build our discussion of the handling of each one around the Purely Developmental discussion process. We can then determine the method of handling used for the other two discussion processes by comparison.

STEP I, APPROACH— ALL THREE SPECIFIC DISCUSSION PROCESSES

In the Purely Developmental conference process Step I, Approach, may be casual and can be made from the ordinary conversation of the group. Through the use of a somewhat closely shaped method of operation, the leader directs the conversation to the idea or subject to be discussed and after all group members are thinking about it, isolates and summarizes it by writing it on the board. This takes alertness and skill on the part of the leader, for he must consider each remark made in the general group conversation, deciding whether he can draw from it an opportunity to make a statement or ask a question that will shape the discussion into a channel leading to the subject he wishes the group to discuss. Since the ordinary group conversation prior to the start of the casual approach is of a general nature not related to the subject for discussion, the leader seeks to find in it ideas or statements that are slightly related to what he

wishes to discuss. After he has focused attention on the one he selects, he attempts to shape gradually from slightly related into closely related material and then into material directly related to the subject he wishes to discuss. From here it is a simple matter to focus attention upon the statement of the major objective or subject to be discussed. At this point, however, only Step I, Approach, of the over-all Step I of the conference has been achieved and it is necessary to promote sufficient discussion to define the scope and limitations of the statement, in addition to clarifying any ambiguous words which it includes. In other words, after getting the discussion into the desired channel, he must watch for indications of acceptance so that he can crystallize it in the form of summation and written statement. It is important that the discussion not be stopped too soon, or the group will not have accepted the subject for discussion. Also, the discussion in Step II of the over-all Approach should not be allowed to overrun or the psychological point for crystallization will be passed and it will be necessary to redevelop it. The key to the situation is the apt use of previous conclusions and objectives as leads to an approach through the use of the association of ideas. For each idea or statement expressed, the leader must quickly review in his mind any possible associations it might have with his objective. These associations can be classed as directly related, closely related, and slightly related. Often it will be necessary to work a slightly related association of ideas. The time for summation is when the discussion is all in the directly related idea classification. Then it is only necessary to make a few spot checks of group acceptance and to summarize the subject to be discussed in the form of a statement.

It is readily seen that when Step I is handled through a casual approach from ordinary conversation, time ceases to be a factor. This makes its use questionable in conferences other than those where it is necessary to get the group on a freely operating basis prior to starting the discussion or in a purely training conference. In leadership training, the casual approach is used to familiarize the group with what a Step I achieves.

1 In the Shaped Developmental conference discussion, a casual approach from ordinary conversation is not used. Step I is often achieved by the leader starting the discussion with ques-

tions that are closely related to the subject to be discussed and, through a brief period of closely shaped operation, focusing the group's attention on directly related material and finally on the particular item for discussion.

Step I in all cases must be used to define the limits and scope of the discussion as well as to state it. Quite often inexperienced leaders fall into the trap of making the summary statement of what is to be discussed so general that the group has difficulty understanding just what is desired and as a result gets off the beam. Often when consistent with the purpose of the discussion, it is desirable to consider only a particular application of the subject to one location, office, job, or organization and then, in later discussions, to broaden the subject out to develop the general phases of it. Another approach is for the leader to provide a brief Informational type of discussion in which the limiting conditions are definitely established prior to treating the subject on the general rather than a specific basis. The leader should not fail to clarify any words of a dual or ambiguous nature that might become controversial; otherwise, each of the group members will be using different shades of meaning for the same word.

Although it is easy to use a bald, direct statement of the subject to be discussed instead of a Step I, this is more than offset by a lack of group understanding of its scope and of what is expected of them. Since no discussion is permitted, the group is generally forced to continual clarification and reversion to Step I during Steps II and III. Step I serves to clarify in the minds of the group the purpose of the meeting and, in turn, the degree to which they are expected to participate in setting up the conclusion to be reached.

Informational discussion processes do not require as elaborate a Step I as the other two although the difference between it and the Shaped Developmental is much less than that between the Shaped Developmental and the Purely Developmental. In all cases, care must be taken to execute Step I properly since the time spent in isolating the subject to be discussed and clarifying it in such a manner that everyone knows its limitations and scope pays big dividends later in the discussion.

WHAT ANY STEP I SHOULD ACHIEVE

To sum up briefly, we might say that Step I should in all cases do the following:

1. Focus the attention of the group on the subject to be discussed.
 2. Define the purpose of the conference discussion or meeting.
 3. Indicate the extent of the desired group participation in the discussion.
 4. Make clear the extent to which the group is to determine the decision to be reached.
 5. Definitely set the scope and limitations of the discussion statement.
 6. Clarify the meaning of any ambiguous words used in the statement of the major objective of the discussion.
- All these items do not of necessity have to appear as definite, concrete statements of fact. Very often they are apparent from the handling of the discussion by the leader.

STEP II, DRAWING OUT— ALL THREE SPECIFIC DISCUSSION PROCESSES

The most critical part of the conference is Step II, the Drawing Out, for it is here that the conference is made or broken. No matter what type of conference discussion process is used, this is the most difficult step to handle; from the leader's standpoint, this is particularly true of the Purely Developmental discussion. Since the shifts in zones of knowledge take place in Step II, the bulk of the discussion is held here. In the Purely Developmental discussion, the leader must have considerable skill to guide and control the discussion, particularly if the greater proportion of it is of the overhead type. In order to fulfill the requirement that the group set up the procedure to be followed, the use of the overhead discussion is the most desirable owing to the feeling of absolute group control that it gives. However, the leader must always use sufficient closely shaped operation to keep the discussion from wandering astray. It takes some time and practice for the leader to learn to guide a discussion skillfully without influencing the group by interjecting his own thoughts and reactions. In addition, most of us have an uneasy feeling that the discussion is getting out of control when the group indulges in overhead operation and as a result, we tend not to permit enough of it. During practice sessions, one of the most beneficial experiences a leader can have is deliberately to allow overhead operation to progress until it is definitely off the subject

and then gradually shape it back into closely related material without making his efforts too direct and obvious to the group. Another is to throw out a general question and then wait until the group provides an answer or starts the discussion, regardless of how long a period of time appears to transpire.

In the Shaped Developmental Step II, the preponderance of the method of operation is on the closely shaped side. However, a reasonable amount of Drawing Out of an overhead nature must be permitted to give the group the necessary feeling of free participation and group control.

From what we have said above, it should be quite evident that Step II of the Informational discussion process is very closely shaped and that overhead operation occurs infrequently although it is bound to appear from time to time.

The limit of Step II is reached when there has been a complete Drawing Out of the group members on the subject so as to obtain their ideas and reactions and, as a result, the necessary shifts in the zones of knowledge. Drawing Out and shifting zones of knowledge are not usually separate and distinct operations. Our Drawing Out of one group member's viewpoints and reactions is bound to bring forth comments, questions, and discussion which, when properly shaped by the leader, achieve some of the zone shift desired. It is actually an ebb and flow progress with the gradual accumulation of a drift in the direction of the conclusion to be reached through the shifts in zones of knowledge of the group members. As has been previously indicated, the groundwork and the basis for group acceptance of the over-all conclusion are being woven and bound up step by step as each of the minor objectives is discussed and group acceptance of them reached. It is similar to the weaving of a fabric in which strands, not of various colors, but of ideas, reactions, and shifts in zones of knowledge gradually form a pattern during Step II whose full significance will not be achieved until over-all group acceptance is obtained in Step III. During Step II, many of the strands of group acceptance are woven and made ready for the finishing touch which gives them meaning and significance when over-all group acceptance is obtained.

As the end of the Drawing Out stage is approaching, the leader should constantly ask himself, "Has there been as much zone shift as we are going to be able to get?" Sufficient questions

should be asked to check this, for the leader must be aware when the end of Step II has been reached and the group is ready for acceptance. Overrunning Step II has a bewildering effect upon a group, for they soon sense that acceptance is on the way. When Drawing Out is extended beyond the natural stopping point and attempts are made to get zone shifts that have already been attained, the group begins to doubt the whole process. Likewise, there is much danger in letting go too soon if some member of the group comes up with the correct conclusion very early in the discussion. It would make too big a jump or leap for the Zone B and C people and would later result in retrogression in the conference process for, after getting what appeared to be group acceptance in Step III, and attempting Summation in Step IV, the discussion would have to revert to Step II when some of the group members woke up to the fact that they were not sure that the conclusion reached was what they wanted. Although this happens naturally every now and then, a continued experience gives the group a feeling of instability and ineffectual handling.

The skillful conference leader also seizes opportunity in Step II to weave Zone A information subtly into the discussion if the discussion stalls for want of it. In addition, he can, as opportunity offers, put out Zone A information to be used in the discussion of subsequent items.

The variations in the use of overhead and closely shaped operation in Step II depend upon the type of conference discussion used. Their variations with minor items discussed are determined by group requirements and the flow of the discussion. This was brought out in Chaps. VI and VII.

THE CONTENT OF A SUCCESSFUL STEP II

Step II must include the following if it is to be successful:

1. A type of specific conference discussion suited to the purpose of the discussion.
2. Sufficient discussion to provide the necessary drawing out and shifts in zones of knowledge.
3. Checks to make sure that maximum possible shifts consistent with type of specific conference discussion have been achieved.

4. Minimum amount of slipping back into Step II from attempting group acceptance and summation before group is ready.

5. Introduction of Zone A information into the discussion as opportunity offers.

6. Discussion not too brief nor too long, but suited to the purpose of the conference.

STEP III, ACCEPTANCE— ALL THREE SPECIFIC DISCUSSION PROCESSES

Without the group acceptance that is obtained and verified in Step III, Acceptance, a conference would not only be futile but would not fulfill the requirements of a conference-type meeting. Group acceptance is often achieved quickly, easily, and simply after the gradual build-up that has occurred in Step II because of the progressive acceptance of the minor objectives. However, group acceptance of the over-all conclusion cannot and must not be assumed to follow automatically as the result of the apparent group acceptance of the individual minor objectives. In the process of associating them together and welding them into one unit represented by the over-all conclusion, there may be some further adjustments necessary in group members' ideas and reactions. The omission of a conscious check of group acceptance of the over-all conclusion gives great difficulty to inexperienced, uninformed conference leaders. This is particularly true because, through checking group acceptance, we find out whether we actually achieved acceptance of the minor objectives. If we rushed through one too quickly or did not obtain true reactions and some group members had given their assent with reservations, it is here that it will become evident and the necessary adjustment made. Sometimes it is only a matter of a brief discussion or a few words; in other cases it may be necessary to go back and reopen the discussion of the particular minor objective as it relates to the over-all conclusion. Step III is actually the leader's lifesaver when properly used, for it gives him a final opportunity to check the quality of what has preceded before making his summation.

In the Purely Developmental conference discussion, overhead operation is used to a much greater degree than in the Shaped

Developmental, while in the Informational it rarely appears. In all three of the specific conference discussion processes, Step III, Acceptance, is of vital importance. Experienced conference leaders can sense the degree to which the stage has been set in Step II for group acceptance and adjust the length and handling of Step III accordingly.

It is important to point out that, when a specific conference discussion process is being applied to a minor objective, Step III, Acceptance, is important even though at times it may be rather brief and most of it achieved as part of Step II. This has led some writers to combine Steps II and III with the result that checking acceptance is likely to be omitted. Most conference leaders will tend to omit Step III because of the sense of a gradual building up of group acceptance in Step II. They feel that it is unnecessary and an imposition upon the group, and then find themselves completely at a loss when Step IV fails.

As will be recalled, it was in Step II, Drawing Out, that zone shifts of factual knowledge were obtained, since understanding comes through the drawing-out process where all the facts are presented and reviewed by the group. We must bear in mind that, to some degree at least, acceptance is built up during Step II even though it is achieved in Step III.

In handling the steps in the conference processes, the leader must remember that, once understanding of the factual information has been gained through the drawing out and through the zone shifts in knowledge that resulted, the individuals in the group automatically fall into three new zones of knowledge with respect to acceptance of a particular conclusion which is being sought or developed. This constitutes a dual use which is made of the principle of shifts in zones of knowledge because the leader is then watching for zone shifts in acceptance of the conclusion. With this in view we can restate the zones of knowledge from the standpoint of acceptance.

Zone A—Those group members who have a clear-cut conception of the conclusion and the basis for it.

Zone B—Those group members who feel the conclusion to be correct but don't know why.

Zone C—Those group members who have no fixed feelings with respect to the conclusion or who may favor some other conclusion.

As Step III progresses, shifts in zones of acceptance occur, with full acceptance being obtained when all group members are in Zone A or such a degree of acceptance is achieved as is consistent with the specific discussion process used. Occasionally it will be found that in the Purely Developmental and the Shaped Developmental conference discussion processes, the group changes from what appears to be a growing acceptance of positive views or conclusion to the negative view. Thus those who were in Zone A with respect to the positive conclusion become Zone C or possibly Zone B with respect to the negative conclusion, with some former Zone C people becoming Zone A. It must be borne in mind, however, that there must be definite, logical development of such change in group acceptance of the conclusion and that it is not merely a transitory phase of the acceptance discussion of the original conclusion.

It is important that the leader realize that there are two uses of the principle of zones of knowledge, for there is a tendency to emphasize the zones of knowledge as they concern factual information and understanding and overlook their application to the group discussions concerning acceptance in Step III of the conference processes.

ACCEPTANCE IN STEP III COVERS FIVE ITEMS

A good Step III achieves these things:

1. Obtains group acceptance in an interesting manner without a man-to-man poll of the group.
2. Provides for checking those group members requiring checks and not those whose acceptance is plainly evident as the result of recently stated convictions.
3. Makes a natural transition to Step IV, Summation.
4. Provides a minimum possibility of having to slip back into Step II but permits it, when necessary.
5. Welds the minor objectives into a coherent over-all group acceptance.

STEP IV, SUMMATION— ALL THREE SPECIFIC DISCUSSION PROCESSES

Step IV, Summation, consists primarily of stating the essentials of the discussion conclusion both clearly and economically. It is seldom desirable to put the conclusion statement on the board

and then get justification of it when making a Summation except when an Informational discussion process is used. Even in this case it is chiefly a timesaving device and must be carefully used since it can operate to cut down the expectancy of group acceptance already achieved in Step III. It is best to put the group in the position of convincing the leader, as this tends to prevent summation before the group is ready for it. Too early a summation cannot help giving the impression that the leader is not in close step with the group and is failing to sense group reactions. It is important that the final conclusion be written on the board and that a few spot checks of the final wording of it be obtained.

In a Purely Developmental discussion, the leader does not word and state the conclusion himself but obtains it from the group, choosing some group member who is a logical clear-thinking type to make the statement for the group. This is characteristic of the Purely Developmental discussion in which the group determines the procedure or conclusion with the leader merely guiding and shaping the discussion.

In the Shaped Developmental discussion, the same general method is followed as in the Purely Developmental discussion Step IV in obtaining summation. In this type of discussion, however, the leader is alert to see that the discussion is closely shaped rather than of an overhead type. At times in the Shaped Developmental discussion, the leader may actually rearrange the wording and statement of the group summation as he writes it, being careful to make only such changes as clarify it but do not change its sense.

The Informational discussion is, as we have noted, quite different in nature from the other two, and it is to be expected that the leader will take more part in phrasing and writing the conclusion since he is a factor in it and in some cases controls it to a very large degree.

A COMPLETE STEP IV

A good Step IV does not neglect the following items:

1. Summation is not made before group is ready for it.
2. The conclusion should be written on the board and acceptance spot checked.
3. The summarizing statement should cover the essentials of the discussion conclusion clearly and economically.

4. The leader's participation must be consistent with the type of conference discussion held.

STEP V, ASSOCIATION— ALL THREE SPECIFIC DISCUSSION PROCESSES

Association, as accomplished in Step V, is purely the function of the leader and must be done smoothly and logically. It must be so stated as to relate properly with other conclusions and subjects in the over-all meeting if it is to be in correct sequence and order with them.

The leader should not overlook the opportunity given by Step V to sow seeds which he can use in Step I for his next discussion subject, provided that there is a relation between the two subjects. A limited opportunity also is given for the introduction of Zone A information for later use.

THE OVER-ALL IMPRESSIONS AND SIGNIFICANCE OF CORRECT LEADERSHIP

As has been previously brought out, the outstanding characteristic of the Purely Developmental discussion is that time is no measure; therefore, in it, in particular, it is impossible to make definite time assignments for each step in the process. Although exact time designations are impossible, in the case of Shaped Developmental and Informational discussions, it is possible within reasonable limits to estimate the time requirements for all steps except Step II. The Informational discussion lends itself most readily to the close estimation of time requirements when its Step II is handled on the lecture basis with brief directed discussion as mentioned in Chap. VII.

Above all the leader must know at all times just what stage the discussion is in; otherwise his leadership will be ineffective and confusing to the group, for ill-advised and ill-chosen attempts to achieve transitions between the steps give the group a feeling of insecurity and aimlessness. The leader must have a definite discussion plan worked out in advance and he must know and be sure of his objectives and their subordinate minor objectives as well as the steps leading up to them.

We must keep in mind that we have been discussing the various steps in the conference process and how to handle them and looking at them in great detail. However, to the conferee, the

conference procedure is not a series of steps but a smooth-flowing, natural discussion. As a result of this, if the leader is aware of what he is doing, he can see the need for the discussion to retrogress when necessary and make it seem perfectly natural and at the same time save it from disaster. From the detailed way in which we have been looking at the discussion as a step-by-step process, one might get the impression that, to the conferee, the discussion would seem like riding in an automobile with five speeds forward when it is driven by an inexperienced driver who fumblingly jams us into each of the successive speeds with a jolt and a shock. All that the conferee senses in a well-led conference is that the discussion started smoothly with the group well aware of what was to be discussed and its scope and limitations and that, after an interesting discussion, an acceptable conclusion was reached. When the leading is ineffective the conferee is conscious that there was confusion as to what was to be discussed, its limits and scope, that the discussion was disjointed and unsatisfactory, and that the conclusion reached was of questionable value.

IDENTIFICATION QUIZ

Write in the number of the step in the General Conference Process to which each statement applies

- Step ____ focuses attention of the group on the subject to be discussed.
- Step ____ provides sufficient discussion for drawing out and shifts in zones of knowledge.
- Step ____ defines the purpose of the discussion.
- Step ____ obtains group acceptance in an interesting manner without a man-by-man poll of the group.
- Step ____ ties up the conclusion with the other conclusions reached.
- Step ____ does not summarize before the group is ready for it.
- Step ____ provides for checking only those group members requiring checks and not those whose acceptance is plainly evident.
- Step ____ indicates the extent of group participation desired in the conference discussion.
- Step ____ welds the minor objectives into a coherent over-all acceptance.
- Step ____ includes the introduction of Zone A material into the discussion as opportunity offers.
- Step ____ makes clear the extent to which the group determines the decision.
- Step ____ is a natural approach to Step IV.
- Step ____ has the conclusion written on the board and spot checked.
- Step ____ is not too long or too short but suits the purpose of the discussion.

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Step ____ makes sure that the maximum possible zone shifts consistent with the type of specific discussion have been achieved.

Step ____ definitely sets the scope and limitations of the problem to be discussed.

Step ____ clarifies the meanings of any ambiguous words in the statement of the problem for discussion.

Step ____ allows slipping back into Step II only when necessary.

Step ____ results in a summarizing statement which is clear, concise, and economical of words.

AI 'III 'I 'I 'II 'III 'AI 'III 'I 'II 'III 'I 'III 'AI 'A 'III 'I 'II 'I :summary

CHAPTER IX

QUESTIONS AND THEIR USE IN CONFERENCE LEADING

THE POWER OF THE QUESTION

It is hard to believe that such a simple thing as a spoken question is one of the keys to human conduct, achievement, and cooperation. Through its use, we are able to obtain an expression of the thoughts and reactions of other individuals and, in so doing, set up channels for the mutual exchange of ideas. The power of the question lies in its requirement of an answer. If it is phrased in such a manner as to require more than a mere "yes" or "no," it is all the more effective. We cannot expect to influence people's decisions or help them form their conclusions unless we know their whys and wherefores. With this knowledge, it is possible for us to make an intelligent, understanding attempt to form or adjust their ideas and, if the circumstances demand it, adjust our own to the other fellow's. In many cases, it is a matter of mutual adjustment with the acceptance of a compromise arrangement. Without the response that a well-phrased question calls forth, very little positive information would be available as to the why of an individual's position.

In one of the earlier chapters, the fact was mentioned that we learn and gain understanding through any or all of our five senses. As you will recall, it was pointed out that we learn best through seeing and that the more senses we call into play in learning, the more readily we learn. When a question and answer are used as a means of gaining understanding, our main channel of reception is, of course, that of hearing. Through the proper phrasing of questions so as to inspire the questioned individual to explain his ideas or reactions fully instead of merely indicating his position with a "yes" or "no," we are able to call into play something secondary to our five senses. For want of a better name, we often call it our subconscious mind, for we speak of it vaguely as the forming of pictures in the mind's eye. Through this ill-defined channel of subconscious perception we gain the advantage

of the impressions and pictures that the descriptive words form in our mind and emotions. In a more rational controlled way, subconscious perception uses the same approaches to our involuntary mental reactions as the orator, the actor, the motion picture, or any of the stimulators of our subconscious which make us almost see, feel, and live what is being portrayed. The very word "reaction" as it applies to what is called forth by a well-phrased question, cannot help causing the individual who replies to go through a vicarious mental reenactment of what he says. Likewise, similar favorable or unfavorable reactions are set up in the listener, for most of us get our impressions through the mental pictures that words convey to us, with the pictures colored by shadings of meanings based on our own experience and conceptions of the words used. It is said that this is one of the chief reasons why so few can really conceive and think in the abstract fields of higher mathematics and physical sciences, for we find it difficult to do our thinking and form our reactions without being able to visualize them in terms of what we see and feel.

The peculiar power of the question reaches more deeply into our natures and involuntary reactions than we realize. It is a two-edged sword that has an effect on both the questioner and the questioned. This is due to its very close relation to the two fundamental human urges which we mentioned earlier in this book, "I want" and "I want to be." A questioner is obviously satisfying the first motive, while the questioned is achieving the far-reaching second type of satisfaction, "I want to be." It is this second feature which is so important, for when the questioner listens sympathetically and understandingly, a sequence of natural reactions is set up within the questioned individual which somehow makes him instinctively more cooperative. How many times have we seen this operate in cases where we have let people get things off their chest? Many times, the mere act of explaining and telling their reactions in reply to a question stimulates the same sort of a response. A judicious use of questions is one of the most desirable and effective supervisory tools when it is coupled with an ability to listen and get the other fellow's viewpoint without cutting in too soon.

Too many decisions are made before all the ideas and facts have been obtained. In the recent book, "The Technique of Handling People," by Dr. Donald Laird, Mr. Walter S. Gifford,

President of the American Telephone and Telegraph Company, is quoted as follows: "It is important in a conference that everyone be given an opportunity to talk at length, that ideas expressed be listened to with tolerance by all." It is of vital importance that the questioner and, in conferences, the group give thoughtful, considerate attention to the contributions of each group member.

**THE FOUR BASIC TYPES OF QUESTIONS—
OVERHEAD, DIRECTED, REVERSE, AND RELAY**

Questions are the main operating device of the conference leader. As we have defined a conference, there must be an oral expression of thoughts and reactions and it is difficult to stimulate expression without the use of questions. If we depend upon reactions to statements and opinions alone, our group participation will be low, because the average individual is not stirred up to the point of expressing himself when a simple statement is made unless he is directly or vitally concerned. In fact, unless we are appealed to in a direct fashion, our mental attention may be elsewhere even though we give the appearance of following what is said.

It will be to our advantage to check over the various types of questions that can be used in conducting a discussion. There are four basic types of questions, the overhead question, the directed question, the reverse question, and the relay question. As the name implies, the overhead question is one which is asked of the group with no particular person specified as the one to reply. In a directed question, we indicate who is to reply. The reverse question is used in reply to a question when the individual questioned does not wish to answer without additional information or is attempting to have the original questioner develop the answer himself. In other words, the question is answered with a question, for the leader directs another question back to the same one who asked him the original question. In many ways, the relay type of question is more a matter of handling than a type of question, for there is nothing creative in it. It comes into use when an individual such as a conference leader is asked a question that he does not wish to answer himself; he relays it by directing it to some individual other than the one who asked it. The leader merely relays the question to someone else, being

careful to do it in a natural way. At times, a question is relayed to the group at large as an overhead question.

The overhead question has its most effective field of use in overhead operation although it can be used effectively in starting the original discussion in a casual Step I such as may be used in the Purely Developmental conference discussion. Its main characteristic is that the question is asked of the group at large with no one being designated to answer. The directed question is one in which the name of the person who is to reply is stated either before or after the question. In group discussions as in teaching, it is desirable to ask the question first and then, after a slight pause, indicate who is to answer. This starts everyone thinking about the question instead of allowing them to relax and let the other fellow do it, which happens when the name is stated before the question. Care should be taken not to allow the pause between the question and the name to be long enough to permit the group to come in and turn the question into an overhead type. The reverse and relay types of questions are particularly suited to closely shaped operation.

Summing up our impressions with respect to the four basic types of questions from the conference leader's viewpoint, we see that, when he wishes to ask a question, he has two alternatives. He may ask the question of the group at large on an overhead basis or he may ask it on a directed basis directing it to a particular individual. When a question originates with one of the group members he has three alternatives: he may relay the question to another group member to answer; he may reverse the question back to the one who asked it, seeking amplification, clarification, or development of the answer; or the leader may answer the question himself. Obviously, if the leader answers the question himself, no direct problems as to the use of questions to further the discussion are involved. From the standpoint of contributing Zone A information, this would take place mostly in Informational-type discussion. It is in the proper selection and use of the basic types of questions that the leader makes or breaks his discussion for they must be adjusted to the type of discussion operation as well as to the needs of the group for securing participation and shifts in zones of knowledge. In the Purely Developmental and Shaped Developmental discussion processes, the leader will seldom answer a question and contribute Zone A

information as such. He will use the relay or reverse type of questions since the group is the source of authority and from them the conclusion will be obtained. It is interesting to note that the relay and reverse questions themselves can be used on an overhead or directed basis depending upon whether the method of operation is overhead or closely shaped. Through the selection and use of the overhead type of question, the leader stimulates overhead operation while, by using directed questions, he places closely shaped operation in effect. In order to stop overhead operation and convert to closely shaped operation, the leader may step in and originate a directed question, he may seize upon a question which one member of the group has asked of another and relay it to still another in the group, or he may reverse the question upon the individual who asked it and then continue on a closely shaped operation basis. It goes without saying that regardless of the specific type of conference discussion used, the leader will make use of all the four basic types of questions. However, the character of the discussion will be evident from the types of questions which predominate.

THE USES OF THE FOUR BASIC TYPES OF QUESTIONS IN HANDLING DISCUSSIONS

The four basic types of questions provide the leader with four useful tools for handling discussions; however, that is not the complete story for each of these four basic types may be used in any one of three different ways to control the course of the discussion. The three ways mentioned are to lead off, to advance the discussion towards its objective, and to provoke more discussion to amplify and draw out a particular point. Figure 14 will help to convey the meaning of these three uses of the four basic questions. A lead-off question is used to start the discussion of a particular major or minor objective and, of course, would most likely be an overhead or a directed question. This is shown by the arrow to the left that starts the diagram. As the result of the lead-off question, several replies would be obtained from group members. The leader would then select one of the responses as the one for discussion and isolate it from the others. In doing this, he would ask a question of a follow-up type thereby advancing the discussion toward its conclusion by separating out the desirable reply for further discussion. This is indicated

in the diagram by the second arrow from the left which is called follow-up. Now, let us suppose that as a result of the follow-up question, several more replies are obtained from the group. At this point the leader has two paths open to him. He may wish to secure further group contributions in the form of ideas and reactions relative to the idea he has isolated with his follow-up question, in which case his question would be of a provocative

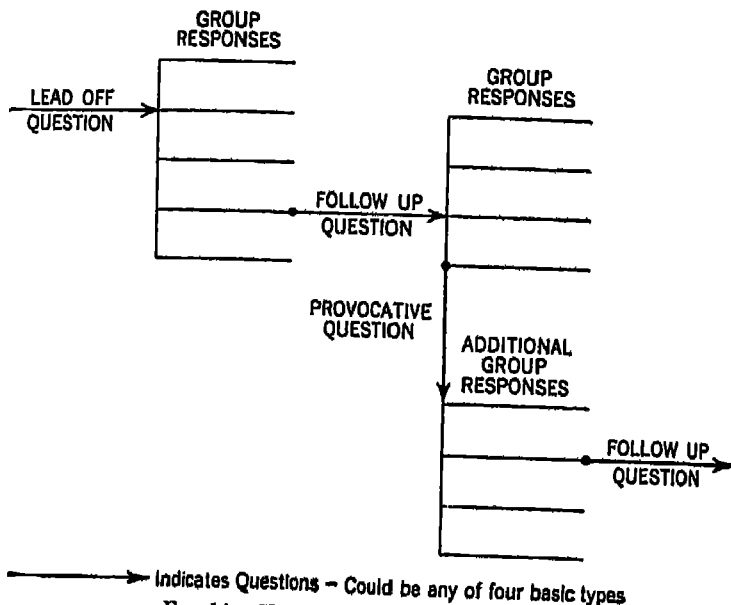


FIG. 14.—Uses of basic types of questions.

nature and expand the discussion vertically rather than horizontally toward its objective. After he had obtained enough discussion to meet requirements by using provocative questions, he would then use another question to follow up the discussion and advance it toward the conclusion. Thus we see that when a basic type of question is used for follow-up purposes, it advances the discussion toward the final conclusion, while provocative use tends to expand the discussion without moving it forward. Some good examples of straightforward, unembellished provocative questions are: "Will you expand on that?," "—and in addition to what you have said, is there anything else?" or "Can you amplify that a little?" Later in this chapter in the list of illustra-

tions of the various ways in which the same idea may be phrased as a question, there are instances of more indirect, subtly phrased provocative questions.

THE IMPORTANCE OF THE PHRASING AND WORDING OF A QUESTION

The most important thing about a question is its wording and phrasing for questions which merely call for a simple "yes" or "no" answer do not draw an individual out of his shell. Questions should be phrased in such a way as to require an explanation of a viewpoint or the relation of an experience. For instance, if we wish to find out how a baseball pitcher throws a curve ball and ask him, "Can you throw a curve ball?" we will probably get a simple "yes" or "no" for an answer. If we phrase the question, "What do you think is the best way to throw a curve ball?" it will call for an explanation and probably some degree of demonstration.

Conference questions should at all times be stimulating in nature, and the phrasing of the questions determines this. Unless we take care to phrase our questions to give the impression we desire, we may involuntarily give the group an impression we did not intend. The same basic question can be phrased and worded so as to be interesting, tactful, commendatory, or censorious as well as to convey many other impressions. As a matter of interest and comparison, a few of the impressions and shades of meanings that can be conveyed by variations in phrasing a question are illustrated below:

ILLUSTRATIONS OF THE SHADES OF MEANING GIVEN A QUESTION BY VARIATIONS IN ITS PHRASING AND WORDING

Idea on which reaction is sought.—The wisdom of advertising to keep good will during wartime when product is not available.

NATURE OF IMPRESSION

CONVEYED	PHRASING AND WORDING
1. "Yes" or "no" response desired	Should we continue our advertising program just to keep good will?
2. Inspired response	It doesn't seem worth while to continue our advertising program just to keep good will, does it?
3. Free expression of opinion	What is your idea, Bill, should we continue our advertising program just to keep good will?

- | | |
|--|--|
| 4. Procedure or factual information requested | How can we find out whether advertising just to keep good will pays? |
| 5. Put on the spot | Can you prove that this program of advertising has been worth while? |
| 6. Build up the one questioned as authority | Bill, you have specialized in customer reactions for many years. Can you explain your ideas on advertising just for good will? |
| 7. Depreciatory | Bill's ideas on advertising for good will just about clinch it but since we have a couple of minutes, can you let us have your views, Jim? |
| 8. Censure | Your layouts seem to have been a flop, Jim. Do you think it is worth while to keep on with this advertising for good will? |
| 9. Commendation | Can you let us have some of your good common-sense ideas as they relate to advertising for good will? |
| 10. Hypothetical status—personal views avoided | The president of one of our largest competitors thinks advertising for good will pays. Can you explain how such a position could be justified, Bill? |
| 11. Appeal for assistance | We have to settle on our budget for advertising and don't know what to do about advertising for good will. Have you fellows any good ideas on it? |

From these illustrations, we see that in addition to questions coming under one of the four basic types and having three possible uses, they can also be phrased and worded so as to give distinct, definite impressions. In this connection, we can see by inspection that most questions that convey impressions are composed of two distinct elements or parts. Sometimes the question as a whole really consists of two distinct sentences, for the part that conveys the impression is a separate element from that which determines the question's basic type and use.

THE HYPOTHETICAL THIRD-PERSON QUESTION AS A CONFERENCE DEVICE

The next to the last example in the series given above, No. 10, not only demonstrates the two elements of a question idea but also illustrates one of the devices of the conference leader often used for handling a subject upon which members of the group have distinct prejudice. Through the use of a third person it

divorces the opinions and ideas expressed from the group. In the above illustration, we have reduced the prejudice to some degree by wording the question "The president of one of our largest competitors thinks advertising for good will pays. Can you explain how such a position could be justified, Bill?" We are not so likely to become unduly exercised about a subject when considering it hypothetically in relation to someone else's ideas. The group has a chance to express themselves without having to take an actual position which they will have to support. In other words, the hypothetical third-person question does a little face saving for both sides. This phrasing can also be used by the leader when he wishes to introduce ideas to the group without making it evident that he is doing so.

THINGS TO AVOID IN USING QUESTIONS

So far in this chapter we have dealt with the general types of questions as well as their actual use as part of the leader's technique. This phase of conference leading will be treated further in later chapters where the technique of conference control is covered. As has been pointed out, questions can create both favorable and unfavorable reactions on the part of the questioned; in a conference, a favorable reaction is the most desirable. The word "favorable" is used here in the sense that it gives the individual questioned a feeling of satisfaction as opposed to one of dissatisfaction, not whether he is in favor of or against the particular item under discussion. A question that gives a feeling of dissatisfaction raises a distinct sense of opposition in the group members. However, it has a limited value in conference leading because it can at least get a sluggish group to moving. It is unwise to ask or phrase questions in such a manner as to incur enmity or fear, for both give rise to involuntary reactions which sharply limit our ability to reason. Fear releases body secretions that dull our reactions and limit normal responses mainly to seeking an escape. Thus we should avoid

1. Arousing antagonism.
2. Asking questions that it is doubtful the individual can answer.
3. Asking questions of a personal nature.
4. Asking questions that build the leader up and knock the group down.

5. Putting an individual on the spot if the leader is his superior, or in front of his boss.

6. Asking sarcastic questions or questions which expose an individual to ridicule.

7. Asking vague, indefinite, or ambiguous questions which a well-meaning individual may answer incorrectly through no fault of his own.

We must never forget that asking a question carries with it the obligation of listening to the answer and giving intelligent, well-considered comments. Questions and answers are an indivisible duo since neither has any value without the other. A conference leader should give strict attention to the individuals replying to the questions he has asked. The leader who does not do so is in exactly the same position as the supervisor who calls an employee into his office, asks him questions, and then proceeds to do other work such as reading or writing while the employee is attempting to make his point clear. It is not only poor manners, but, as we have discussed previously, a sure way of stirring up the resentment which accompanies an inspired feeling of inferiority.

PERSONALIZING QUESTIONS TO CONVEY SINCERE IMPRESSIONS

Although the analysis of questions and what might be called the straightforward mechanics of their use is of vital importance to the conference leader, the effectiveness of questions is greatly lowered, if not lost, unless they are given a personalizing warmth and life. No matter how expertly the question may be chosen as to type, or how well it is phrased or how skillfully used, it will fail to achieve its full purpose if it lacks the human qualities which make it readily accepted and welcomed.

The tone and manner of the leader are just as much a part of the impression conveyed by the question as its wording. A leader may by his tone of voice involuntarily and unconsciously betray the secret that he doesn't like to conduct conferences or that he personally doesn't think too much of the individual being questioned, or any other of the many prejudices that may lie beneath the surface of our spoken words. Again we see that a leader must be genuinely interested in people and their reactions and enjoy the challenge presented by the ever-changing problems in personalities which confront him. The only sure way to

prevent personal reactions being sensed by the group is not to permit oneself to have them. This is easily achieved by devoting one's whole energy and attention to handling the subject under discussion, at the same time maintaining a real, sincere desire to put the group's interests first and help them achieve an acceptable conclusion. This ties in quite intimately with the desirable traits and characteristics of a conference leader, which we shall discuss in a later chapter.

The leader's presence, decisiveness, and confidence carry a great deal of weight in shaping the impressions conveyed by his questions. He must throw out his questions in such a way as to give a definite impression that he himself is interested. If he hesitantly and uninterestedly sneaks out a question, the group feels his lack of enthusiasm and responds apathetically. If the leader is not interested himself, how can he expect to stir up interest within the group?

The leader should go to any length to avoid giving the impression of a lawyer questioning and cross-examining a witness. This is an easy habit for supervisors to fall into since they are accustomed to ferreting out facts in their day-to-day supervisory job. It not only causes the group to cover up, it also gives them the impression that the leader is trying to show how sharp and clever he is.

All craftsmen who take a justifiable, worth-while pride in their skill and work are jealous of the way they use the tools of their trade. The conference leader is in the same position; however, he works with people and their ideas and reactions, which he shapes principally through the use of questions as his main tool. He keeps these tools running smoothly by the application of understanding and interest in the group's welfare.

Few subjects are as interesting or as extensive as questions and the part that they play in our lives. We have limited our treatment of questions to the fundamental principles which apply to conference leadership, supervision, and our ordinary daily conversation. This chapter ties in with Chap. XIII, Discussion Control and Guidance, which covers at some length the use of questions by the conference leader in shaping and guiding the discussion. A complete analysis of the use of questions is provided as part of the check of the quality of the discussion conducted by the leader.

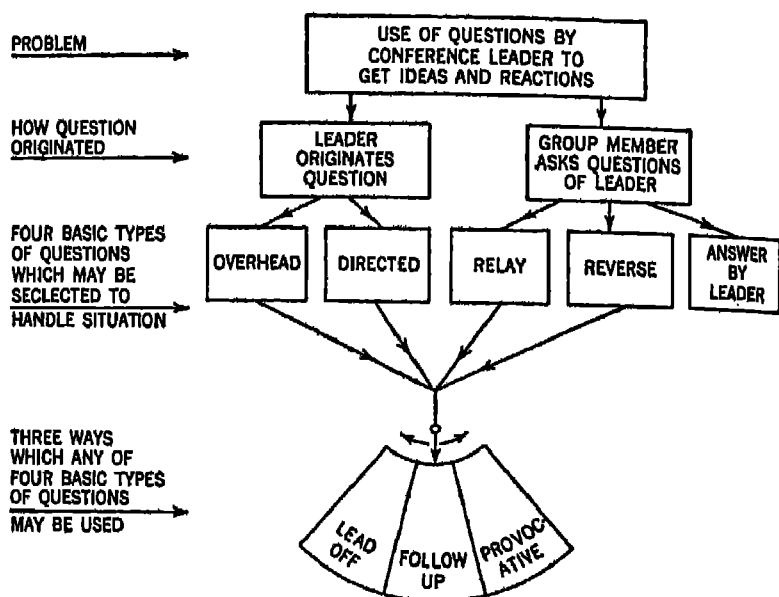


FIG. 15.—Flow diagram summarizing Chap. IX.

TRUE-FALSE QUIZ

	True	False
1. The power of the question lies in its requirement of an answer.	___	___
2. A well-phrased question calls for an answer which the person will picture in his mind.	___	___
3. The ability to listen must be coupled with the use of questions as a supervisory tool.	___	___
4. Questions are a minor tool of the conference leader.	___	___
5. Stimulation of discussion is almost impossible without the use of questions.	___	___
6. There are four basic types of questions.	___	___
7. The overhead question is directed, by giving his name, to the individual who is to reply.	___	___
8. Directed questions are asked of the group without a particular person being specified as the one to reply.	___	___
9. In a reverse question the leader directs the question back to the one who asked it.	___	___
10. A relay question is one which the leader directs to some member of the group other than the one who originated it.	___	___
11. A question is never relayed to the group at large on an overhead basis.	___	___

	True	False
12. The overhead question is most effective in starting overhead operation.	_____	_____
13. In a directed question, it is usually best to give the name after the question is asked.	_____	_____
14. The reverse and relay questions are not particularly suited to closely shaped operation.	_____	_____
15. The leader makes or breaks his discussion through the proper selection and use of the four basic types of questions.	_____	_____
16. The relay and reverse questions cannot be used on an overhead or directed basis.	_____	_____
17. Closely shaped operation is placed in effect by the leader by using directed questions.	_____	_____
18. Regardless of the specific type of conference discussion used, the leader will make use of all four basic types of questions.	_____	_____
19. The character of a discussion will be determined by the types of questions which predominate.	_____	_____
20. Each of the four basic types of questions may be used three ways to control the course of a discussion.	_____	_____
21. A question is used as a lead-off question when it starts a discussion of a subject.	_____	_____
22. The discussion is advanced toward its conclusion when a question is used for follow-up purposes.	_____	_____
23. Provocative use of a question tends to expand the discussion without moving it forward.	_____	_____
24. The phrasing and wording of a question are of minor importance.	_____	_____
25. Questions should be phrased so as to require an explanation of a viewpoint or the relation of an experience.	_____	_____
26. Care must be taken to phrase a question to convey the desired impression as well as to fulfill its basic type and use.	_____	_____
27. The use of third-person questions does not help to relieve tension where prejudice is present in the group.	_____	_____
28. Questions can create both favorable and unfavorable reactions on the part of the person questioned.	_____	_____
29. Questions which create a feeling of dissatisfaction are never used in a conference.	_____	_____
30. Asking a question does not carry any requirement to listen to the answer.	_____	_____
31. If a question is properly chosen as to basic type and use and is worded so as to convey the desired impression, it does not need to be personalized.	_____	_____
32. The leader's presence, decisiveness, and confidence carry a great deal of weight in determining the impressions his questions convey.	_____	_____
33. The leader's interest in the questions he asks does not directly affect the group's reactions.	_____	_____

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	True	False
34. A leader should never give a feeling of cross-examination to an individual or group.	_____	_____
35. Questions are the leader's tools and he keeps them in good working order by his interest in the group's welfare.	_____	_____
36. The use of questions and discussion control and guidance are not related.	_____	_____
37. A question and its answer are an inseparable duo.	_____	_____
38. A knowledge of questions and their use is essential to a supervisor regardless of conference leadership.	_____	_____
39. The proper use of questions is an aid to ordinary conversation.	_____	_____
40. It is not unusual to go through a whole day's contacts with people and not ask a single question.	_____	_____

SUGGESTED EXERCISES AND OBSERVATIONS

We are constantly asking questions and making replies to them and thus have a continuing opportunity to apply the rules and principles that govern their use. With a little observation, practice, and thought, we can improve our ability as conversationalists, supervisors, and conference leaders by consciously selecting the right basic type of question and using it so as to give the exact results we want.

1. Before attempting to use the basic types of questions, spend some time listening to questions asked by others and classify them mentally as to the four basic types. Continue the listening-post procedure by mentally classifying questions you hear as to their use, *i.e.*, lead-off, provocative, and follow-up. Finally, classify questions you hear as to basic type and use.

2. The second step is to try out the basic types of questions in your day-to-day conversations at work and elsewhere. Follow this up by deliberate trials of the lead-off, provocative, and follow-up uses of the basic types of questions. Train yourself to select the basic types of questions and how to use them so as to fit the needs and requirements of your conversation or discussion.

3. By checking questions asked of you as to use, let your knowledge of the three uses of questions help you make intelligent replies.

4. Observe questions you hear asked as to the shades of meaning given them by their phrasing and wording. Note instances in which the impression conveyed did not suit the reaction seemingly sought.

5. Note instances in which the questioner makes a decision without using any provocative questions to give the questioned individual a chance for a full explanation. The dual relation of asking-listening as well as the benefits should be apparent.

CHAPTER X

CHARACTERISTICS OF INDIVIDUALS AS AN AID TO GUIDING CONFERENCE DISCUSSIONS

The remarkable place occupied by questions in our everyday life as well as in the conference process was strikingly evident in our discussion of their nature and uses in the last chapter. Questions are, of course, directed at people and in a conference, to the members of the group. Thus any treatment of conference background and technique would be incomplete without some analysis of individuals in order to develop some guiding rules as an aid to conference discussion. The scope of our discussion will, of necessity, be limited to those traits which will further the development of a satisfactory conference leadership procedure. The over-all subject itself has many interesting and fascinating phases, for contact with people always has been and always will be the most compelling in human experience.

THE TWO GENERAL SITUATIONS INFLUENCING INDIVIDUAL CHARACTERISTICS

From our standpoint, there are two general situations under which we shall investigate the characteristics of individuals as they relate to making a conference a productive, satisfying, and inspiring experience for the group and the leader. In day-to-day business conferences involving groups made up of men within one organization who, for the most part, already know each other through past association, we generally have a much less tense starting and operating condition than exists in intercompany or interindustrial conferences composed of comparative strangers. In intracompany conferences the leader knows the characteristics and backgrounds of the conferees or is able to obtain some ideas about them and the group has a common background of policies, operating methods, and general objectives. All these things tend to create a freer atmosphere for initiating conference discus-

sions without devoting as much time to the removal of the natural restraints present in a conference group. Intercompany or industry conferences are similar to those of an intracompany type; however, they present more problems because of differences in objectives, practices, and policies as well as a lack of knowledge of each other's characteristics and reactions.

The second type of conference situation occurs in a purely training conference such as is used in supervisory training in business and industry, in sales training conferences, and in university graduate seminar work. In the purely training conference, there is a lack of the direct, competitive element that underlies the purely business conference, even though at times it may not appear on the surface or be sensed. This makes a somewhat different general viewpoint necessary for a correct application of individual traits to conference procedures. The same characteristics in individuals take on different shades of meaning and modes of expression under the two situations. As an illustration, a group of engineers and executives from an electric power company, an illuminating gas company, and a street railway company meeting in conference to set up procedures governing the joint use of right of way, would exhibit different manifestations of the same characteristics from a group of supervisors within one of the companies attending a purely supervisory training conference. Recognition of these differences in manifestation is best learned through experience. In this chapter, we shall treat the general characteristics as they apply in conference leadership, assuming an average condition, and what we develop will apply in a fundamental way to both of the situations we have mentioned. Although an individual's basic reactions in both situations may be the same, his manifestations of them will be colored by the situation. However, a knowledge of the fundamental or average condition will equip the alert leader to make full effective use in his leadership technique of the variations in personal characteristics of individuals.

THE INSTINCTIVE TENSION OF A GROUP DURING THE INITIAL CONFERENCE SESSION

The fact that people tend always to react similarly to the same situation gives us cause for reassurance. A group naturally will be under some tension during the start of a conference, in the

same way that an individual cannot help experiencing some tension even when meeting another individual for the first time. It is natural to withhold a little bit until we have had a chance to size up the other individuals, form our opinions, and sum up our reactions. Nature provides for an instinctive defensive testing-out process before venturing too far. Thus there is no cause for alarm in the fact that until the ice is broken and a group feels at ease with one another, a sense of tension will persist. The leader can almost feel the tension ease when a group realizes that it is made up of a bunch of regular fellows after all and that no one is going to get burned at the stake or crucified. It is difficult to estimate the characteristics of the members of a group until the period of tension has passed and a sense of belonging has been achieved. Sometimes in intercompany and interindustry conferences the competitive feeling can be subdued only to a point where it does not markedly restrict free expression, since an underlying current of it will always be present. The leader must keep in mind that any group is composed of normal people after all and that the basic characteristics of individuals as we shall discuss them will apply although they may manifest themselves differently in different situations.

CLASSIFICATION OF PEOPLE FROM A CONFERENCE STANDPOINT

It is not strange therefore, that the first thing we think of when we have a conference to conduct is what kinds and types of people are going to make up the group. We feel that we must find out all we can about each of the individual conferees so as to be better able to handle the discussion. It is natural for us to be concerned as to whether the discussion will fall flat and fail. We are particularly aware of the possibility that the group may get out of hand. If we are not personally acquainted with all the group members and have no reliable information about them, one of the indirect major objectives of our first conference session is to judge and classify them. We are particularly interested in whether some group members are ready and easy talkers, because there must be some in the group to keep the ball rolling. Let us list the characteristics that we should look for and determine during the first session of our conference. We should classify individuals as:

1. Fluent talkers.

2. Average talkers.
3. Poor talkers.
4. Quick-trigger type.
5. Clear-thinking and cold-logic type.
6. Phlegmatic type.
7. Argumentative type.

Occasionally there may be an individual or individuals in the conference group who have or form a personal dislike for the leader. Sometimes the leader knows this prior to the conference while, in other cases, it may not be evident until he senses it during the conference. This is not a natural characteristic of individuals but an unusual situation which might arise in a conference. It is covered in Chap. XI which deals with situations and problems in conference leading.

During the first conference sessions, the leader will resort to closely shaped operation because of the tendency for the group to be in a state of tension and the opportunity that it gives the leader to do more talking and carry the load temporarily. Through the use of closely shaped operation, the leader is also able to distribute the participation so that he can determine the characteristics of the group members. During this time, his use of the four basic types of questions will be largely on the provocative rather than the follow-up side.

HOW TO USE VARIOUS INDIVIDUAL TYPES IN CONFERENCE DISCUSSIONS

When we have gained information as to the characteristics of the various individuals, we can make use of it in many ways. For instance we should

1. Use those who argue to start discussions.
2. Use the cold-logic type for statement and summing up. This type is also useful in getting the discussion back on the beam if it is referred to them when it is going astray.
3. Use the quick-trigger type to stimulate discussion.
4. Use the phlegmatic type to slow down discussion when the pace is too rapid.
5. Use the average talker to pace the discussion.

Regardless of whether an overhead or closely shaped operating method is used or whether the discussion is handled on a Purely Developmental, Shaped Developmental, or Informational basis,

all types are needed at times in the discussion. It is necessary to watch the distribution of the discussion and guide it carefully if all are to participate to the degree necessary for their understanding and acceptance. This does not mean that everyone in the group must be worked into each and every discussion to the same degree but their reactions must be watched and studied if we are to be able to determine whether it is necessary to call them into the discussion to check zone shifts or acceptance. The leader must be constantly on the watch for changes in zone distribution in order to use effectively the crossfire between Zones C and A in guiding the discussion.

EFFECT OF COMPETITIVE INTEREST ON EXPRESSION OF CHARACTERISTICS

In order to clarify further the effect of the underlying current of competition that is particularly evident in the intercompany business conference, let us illustrate briefly what is meant by the shades of expression that may color normal individual characteristics. Under the situation mentioned, a normally fluent individual may at times hold back and not react characteristically in attempting not to disclose his hand or to stick his neck out too early in the game if his own direct interests are involved. At other times in the conference, he will be perfectly fluent and tend to react characteristically. Similarly, a poor talker or a phlegmatic individual may jump in, seeming to act out of character for short periods if his own competitive interests are in danger. These variations will not kill the conference nor even startle the conference leader if he is aware of the possibility since, during the greatest part of the time, the group members will tend to follow average characteristic patterns for reaction.

PLANNING CONFERENCE SEATING ACCORDING TO INDIVIDUAL CHARACTERISTICS

To provide for a balanced discussion, the characteristics of the group members should be taken into account when the seating is arranged. In addition to separating individuals who are close friends or closely associated in their daily work and who might start individual conversations, we should set up good distribution of discussion by making the best possible use of the type of

individuals. Changes in seating after the start of the conference are usually ill advised and should be made only as a last resort.

A seating arrangement should be planned on the basis of overhead operation. The main objective is so to distribute the ready talkers around the table that when the leader raises a question, the natural flow will be across those who are less likely to participate. This will not only keep them actively aware of the discussion but will also tend to bring them into it. A poor seating arrangement where the natural discussion flow takes place at one end of the table or between adjacent group members makes the others feel left out besides preventing all-inclusive operation. The diagram of the natural flow of overhead operation around a conference table shown in Fig. 16 is not intended as an exact model to be followed faithfully for all groups; it only illustrates the principles involved. Many times a particular individual might have prominent dual characteristics such as being coldly logical and a fluent talker, coldly logical and a poor talker, or coldly logical and highly argumentative.

The same general arrangement of individuals applies for the closely shaped operation as for the overhead. A glance at the diagram will show that the leader could start a discussion by giving it to a fluent talker, at the opposite end of the table or to an average talker. In addition, if he has fluent, quick-trigger, and average talkers properly placed, he will have sufficient points to which he can shape a discussion at any time and be sure of a response and still not short-circuit too large a number of the group. We must keep in mind that in choosing the participants in the closely shaped operation we also have to be guided by the zone knowledge if we are to inspire a natural discussion with sufficient spontaneous limited amounts of overhead to keep it interesting.

As you will note, the highly argumentative or hostile type is placed next to the leader at his left. This is done deliberately for this is known as the blind spot position. It is natural for a right-handed person to short-circuit an individual on his immediate left and as a result the leader can, without effort or evidence of deliberate intent, short-circuit a person in this position. Thus he can shoot his questions to others, ignore the ill-advised contributions of the individual in the dead spot, and make it seem natural to do so. After a few such experiences of being left out,

most people get the idea and guide themselves accordingly. Such an arrangement is also of advantage in overhead operation for, when it becomes necessary, the leader can closely shape the discussion so as to exclude the annoying party. The reason that a right-handed conference leader tends to by-pass the group member next to him on his left is best illustrated by the fact that when he rises from his chair to write on the board close behind him, he will involuntarily turn to the right since that is the shortest

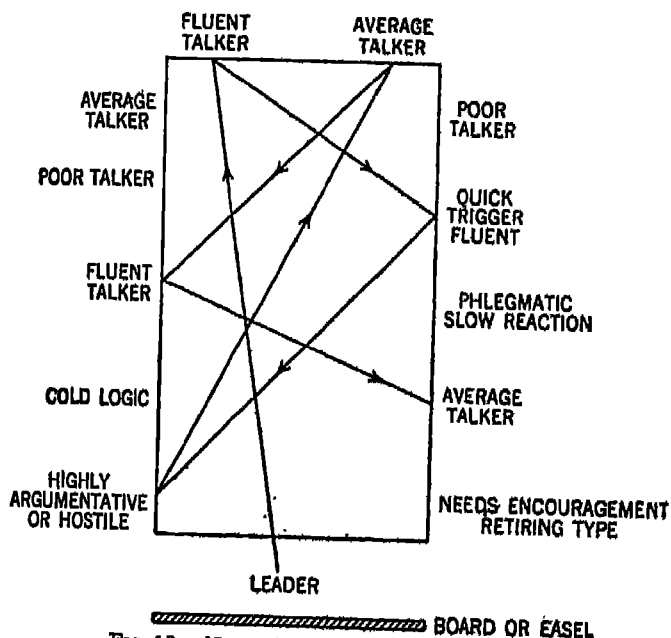


Fig. 10.—Natural flow of overhead operation.

path to put his right hand in a writing position. Likewise, a left-handed leader will tend to the opposite reaction and will short-circuit the group member next to him on his right.

In the day-to-day business conference where a group seats itself more or less at will, it is not possible to arrange the group members about the conference table in such a way as to obtain full realization of their individual characteristics. Where the seating is fortuitous, the conference leader must be on the alert to classify individuals as to their characteristics and guide and shape the discussion with this in mind. In the business conference, it

would be unwise to break up the "boss and satellite" combination in which the ranking superintendent or supervisor attends the conference accompanied by one of his staff who is familiar with the details of what is to be discussed. Since the staff member will be on the alert to feed his boss bits of information and advice on what is discussed, it would be foolish as well as fatal to the success of the conference to break up such a necessary combination. Although a formal seating arrangement is more characteristic of the purely training conference than the day-to-day business conference, the same principles with respect to the use of the characteristics of individuals and the natural flow of overhead discussion apply. Choice of the type of meeting or conference best suited to the meeting objectives and good leading technique will in many ways offset the disadvantages of a poor seating arrangement.

SIMPLE METHODS OF CHECKING CAPACITY FOR UNDERSTANDING AND LEARNING

A conference leader, like a teacher, must have some easily applied means of checking to see whether a lack of ability on the part of a group member causes him to fail to gain understanding or react satisfactorily. The old adage that "it is the teacher's fault if the student fails to learn" is true only when average normal intelligence is presupposed. The conference leader in all probability will not run up against this problem as often as the teacher, with whom it is only an occasional experience. Some standard for checking is essential; otherwise, the conference leader may be attempting to secure a zone shift and acceptance which are impossible, or at least not worth the time they would require. Unless a standard for comparison is available, the conference leader has no way to gauge whether the individual has not made the zone shifts for acceptance because he is unconvinced or because he lacks the ability or mental capacity to do so. The same quick approximate check can be used by both the conference leader and the teacher.

The indices to an individual's capacity to understand and learn are two in number. People who have good learning ability always have these two qualities to a reasonably high degree:

1. Power of concentration.
2. Ability to perceive significance.

Watching for and recognizing a lack of either or both of these qualities enable us to pick out individuals needing careful and special treatment. Furthermore, it also enables us to detect extreme cases and not assume that the fault is with the leader or the conference group when such is not the case. These two simple rules are not difficult to apply as these qualities are readily detected. If time after time a man cannot keep his mind on the subject under discussion or cannot perceive the significance of what is going on, it should be apparent to the leader that the individual's mental capacity is low. Of course, it is seldom that we find an individual who lacks both of these qualities to a really marked degree unless he is in the dullard mental range. However, either one or both of these qualities can occasionally be lacking to such a degree as to make it uneconomical of the leader's and the group's time to secure that individual's complete understanding and acceptance.

As a matter of interest, these same two general rules are used by supervisors, employment managers, and interviewers on a continuing basis. A little conscious direction of the conversation or discussion will give an indication of an individual's lack of these qualities if it is significant. Sometimes an individual's personality, his willingness, and his cooperative, sincere attempts to make good prevent the leader from realizing that his intelligence is below average. Such situations must be sized up in as impersonal a manner as possible in order to be fair and to make our decisions of value.

THE "MALE MENTAL PAUSE" AND ITS SIGNIFICANCE

From the standpoint of the age groups that we encounter in day-to-day business conferences, any mention of the two indices of learning ability must be accompanied by some comment upon which we shall term the "male mental pause." Learning ability and the male mental pause should not be confused; a lack of learning ability is inherent and unfortunately permanent, while the male mental pause is, almost without exception, a temporary condition. Since in many cases the individuals with whom we deal in our business conferences are drawn from the same general group over a considerable period of years, we need to be aware of this from a conference standpoint as well as from a normal common-sense supervisory and personnel angle.

In the more pronounced manifestations of what we have termed the male mental pause, its effects are almost as far-reaching although in a somewhat different way as in the case with the woman in her late forties. All of us are familiar with the apparently unexplainable instances in which a man who has had long active service and shown marked ability suddenly goes into a slump in his middle or late forties. The quality of his work drops; his errors in judgment increase; and he lacks the interest and drive that he has always shown. Of course, the percentage of these cases is usually higher among nonsupervisory employees where a feeling of frustration may have more opportunity to develop than at supervisory levels. However, it is rather a characteristic of the period in life than the level in the organization.

No one can say exactly what touches off each case; a man may suddenly realize that after all he is not going to be able to achieve the high pinnacle of success he may have set for himself; his chances of becoming president or general manager are practically nonexistent. Or the cumulative effects of such factors and the release from the demands of a growing family when they start reaching maturity may play a part in the letdown. Fortunately, in most business organizations such cases are treated sympathetically and in the course of a year or two, at the most, the individual pulls out of it. In some cases, release may be sought in drinking or in other types of indiscretions which affect the individual's job and, if not overcome, may have rather serious permanent effects on his career. It is not our purpose here to go into the ramifications of such problems, although they are vital and interesting, but rather to point out the possibilities of their existence in group members. Within a particular organization, it is quite possible to handle them sympathetically and understandingly. Once the leader has sensed the reason for apathy or an opposite reaction such as undue belligerence, both he and the group can adjust their expectancy of understanding and acceptance accordingly. Frustration usually manifests itself in action and the attempted compensation through action may take forms having no connection with the original cause of the frustration. It is not within the scope nor the intent of this book to cover the handling of such cases. However, it might be well to point out that the best possible solution is to provide desirable channels for outlet. Throughout our lives, the provision of

psychological cushions is essential to survival. Many individuals supply them for themselves in the form of hobbies and activities which compensate for frustration on and off the job while others need someone else to guide and help them in providing the necessary balance wheel. Most of us desire to achieve high success but few of us will admit even to ourselves that we are unwilling to give up the outside activities or family relationships that mean so much to us or put in the added effort and time necessary to achieve it. Cases of the male mental pause are not numerous, but the conference leader should be aware of their existence and not be caught off guard if he is faced with such a situation.

THE DESIRE FOR SELF-EXPRESSION AND ITS USE IN CONFERENCES

If there is one single characteristic which all of us have in common, it is our desire to talk about ourselves. A conference leader should never forget that this is an indispensable means of obtaining interesting, effective group discussion. Our inherent willingness to talk about ourselves can be naturally and easily exploited by the skillful conference leader through the device of asking group members to give illustrations of points under discussion from their own experience. Nothing is more enlightening to a conference leader during his training period than to resort to this device when the discussion is lagging and see the rise in interest which results. In fact, the conference leader will find that the recitation of his own personal experiences, either actual or conjured up to fit the case, forms an admirable way of contributing Zone A information or provoking additional discussion in the group.

THE INTERRELATION OF THE LEADER'S TRAITS AND THE GROUP'S CHARACTERISTICS

Before completing this chapter, we must emphasize again that in our discussion of the various factors that make up a conference leader's background and technique, we are looking at each one in detail and that all of them must be welded together to form a sensible, useful whole. This chapter must be interwoven with the following chapters on situations and problems in conference leading and the desirable traits and characteristics of a conference

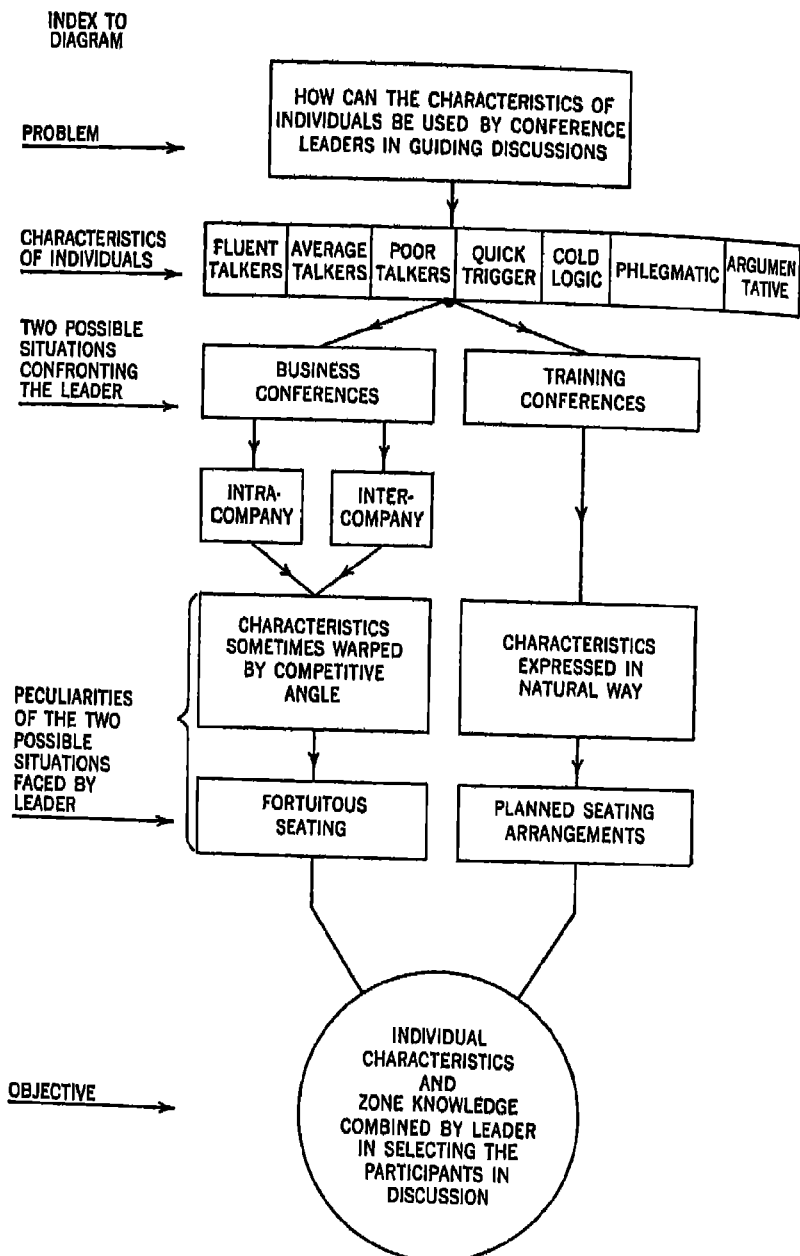


FIG. 17.—Flow diagram summarizing Chap. X.

leader, since the conference process requires the interrelated actions and reactions of both the leader and the group for its achievement.

COMPLETION QUIZ

Write in missing words

1. There are _____ general situations under which it is desirable to investigate the characteristics of _____ as they relate to conference procedures.
2. The first situation involves _____ business and intercompany conferences.
3. The second is the _____ type of conference.
4. The direct competitive element is lacking in the _____ conference.
5. The same characteristics in individuals take on different _____ of meaning and expression in the two _____.
6. Until the ice is _____, a sense of _____ will persist in a group.
7. It is difficult if not impossible to size up individuals until the _____ has been _____.
8. For conference discussion purposes we should classify individuals as
 _____ talkers
 _____ talkers
 _____ talkers
 quick _____ type
 _____ logic type
 _____ type
 _____ type
9. During the first conference session with a group, it is natural for a _____ to use _____ operation.
10. In his get-acquainted session, the leader's questions will be used to _____ discussion.
11. The leader should use
 those who _____ to start discussions,
 _____ type to sum up and get the discussion back on the beam if it goes astray,
 _____ type to stimulate discussion,
 _____ type to slow down discussion,
 _____ talker to pace discussion.
12. _____ of individuals are needed at times in all conference discussions.
13. The _____ of the discussion among group members must be watched if all are to participate enough to get understanding and _____.
14. When possible, the _____ of conferees should be planned in advance so as to get good _____.
15. A seating arrangement is planned on the basis of _____ operation.
16. The same general arrangement will work for _____.
17. The blind spot is _____ to the leader on his _____.

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18. In day-to-day business conferences, a planned seating arrangement is usually _____.

19. The proper type of meeting and good leading technique will _____ a poor seating arrangement.

20. Quick checks of an individual's capacity to understand and learn are _____ of _____ to _____.

21. It is sometimes _____ of the group's and leader's time to attempt to get 100 per cent _____ of all group members.

22. Learning ability and _____ should not be confused.

23. The one single characteristic most common to all of us is the desire to _____.

24. The _____ of personal _____ by group members keeps up interest.

25. The conference leader can use illustrative experiences as a means of contributing _____ information when it is needed.

Answers: 1. two, individuals. 2. day-to-day. 3. purely training. 4. tension, broken. 5. shades, situations. 6. broken, tension. 7. matic, Argumentative. 8. Fluent, Average, Poor, trigger, Cold, Phlegmatic, Argue, cold-logic, quick-trigger, phlegmatic, average. 9. reader, closely shaped. 10. provoke. 11. argue, cold-logic, quick-trigger, phlegmatic, average. 12. All types. 13. distribution, acceptance. 14. seating, discussion. 15. overhead. 16. closely shaped operation. 17. next, left. 18. not possible. 19. office. 20. lower, concentration, Ability, perceptive significance. 21. uneconomical, acceptance. 22. male mental pause. 23. talk about ourselves. 24. recitation, expert- ences. 25. Zone A.

SUGGESTED EXERCISES AND OBSERVATIONS

1. Observe the members of any business conference group and watch for the manifestations of the competitive element when questions arise that might affect their standings as authorities. Note how it changes their normal reactions and the ways in which their characteristics express themselves.

2. Try sizing up and classifying the individuals about you as to where they fall in the classification list below:

- a. Fluent talker.
- b. Average talker.
- c. Poor talker.
- d. Quick-trigger type.
- e. Clear-thinking and cold-logic type.
- f. Phlegmatic type.
- g. Argumentative type.

In group conversations and in discussions try using the various types and note effects on the discussions.

3. When an overhead type of discussion takes place in any group or gathering, watch and check the path it takes from person to person, noting

the types of individuals who participate the most as well as the effect of the different types on the discussion.

4. Over a period of a few days, estimate the capacity of various individuals as to understanding and learning, checking their power of concentration and ability to perceive significance through conversation. Make opportunities to contact as many levels of general intelligence as possible.

5. Deliberately inspire someone who is naturally difficult to talk to, to talk about himself, his accomplishments, or his ideas, then try to shape the conversation to another subject and keep him talking on it.

CHAPTER XI

SITUATIONS AND PROBLEMS IN CONFERENCE LEADING

THE BROAD NATURE OF CONFERENCE SITUATIONS AND PROBLEMS

Our study of people has covered not only how we think and our involuntary mental reactions but, in the last chapter, how these traits affect the personal characteristics of individuals. Although we are considering chiefly how the conference leader can use these characteristics to build a natural leadership technique, it is evident that individuals and their personalities vary over a wide range. If this were not true and all people had exactly the same make-up, personalities, and characteristics, life would be rather monotonous, to say the least, and conference leadership could be systematized into a single simple routine. The fact that no two people are exactly the same naturally gives rise in conference leading to many situations and problems from a purely human angle. These lend color and life to the step-by-step routines that make up what we have termed the general and specific conference processes. Like every other physical or mental structure erected by man, these processes have no real meaning or volition until activated by the manifold personalities of the individuals concerned. Each group of conferees has and will develop an over-all group personality based not only on the intermingling of the individual personalities of the group but on the leader's attitude and his skill in conducting the discussion.

In this chapter, we shall devote ourselves chiefly to a study of the situations and problems that the leader may encounter during the course of a discussion and the way to handle them. Although the situations that might arise in a conference are innumerable, there are some typical classifications under which most of them will fall. We shall review some of these typical situations and see what procedures the leader might use to meet them. Even though we cannot review them all in detail, we shall secure a background of action which can be adapted to meet specific cases and

upon which a leader can build his technique until he has gained firsthand experience of his own.

THE THREE ORIGINS OF CONFERENCE PROBLEMS AND SITUATIONS

Before dealing with individual situations and problems that may be encountered, let us pause for a moment to determine upon the sources from which they might originate. At first one might think that all situations and problems originated with the group. However, a little thought shows that conference situations and problems may develop from three basic sources. First, we must not forget that the leader's own actions may create some of them. Secondly, the group's actions and reactions will be responsible for a large majority of the problems; the third type arises as a result of outside distractions. Each of these originating sources will require our attention and study; however, before we look at them individually, we shall first consider a major factor that influences the first two—the leader's attitude.

THE LEADER'S ATTITUDE AS AN OVER-ALL FACTOR

The leader's attitude directly controls and affects his own actions and, as a result, the situation and problems due to them. The leader's attitude also influences the group's actions and reactions and, consequently, the situations and problems that may develop out of them. Obviously the leader's attitude has no effect on the situations and problems that arise from the third source, distractions outside the conference group and room. Both the leader's attitude and his actions are completely interwoven with his own individual traits and characteristics, to be discussed in the following chapter. In this chapter we shall separate out only those general traits which we shall need to picture properly the situations and problems in conference leading and the handling of them.

The general tenor and attitude of all groups in the long run is one of fairness. If the conference leader focuses all his attention and efforts on conducting the discussion to the best interests and advantage of the group, he will have little difficulty in securing their cooperation. The leader's attitude is readily sensed by the group and is one of the most vital factors.

We all abhor the "big shot" type who tries to dominate and impress us. This is most disastrous with a group because conferences are never held solely for the purpose of getting group acceptance of the superiority of the leader. Unfortunately, this may sometimes be a by-product of a Type 1 meeting, but a Type 1 meeting is not a conference.

We all know that confidence begets confidence and that doubt, lack of confidence, and fear inspire like reactions. Few concrete facts are known about what is termed "thought transference" but there is little doubt that it does exist and that our subconscious reactions are in some way involuntarily felt by those around us. What we term "presence" means a great deal, since a person with presence automatically establishes a position of leadership. The world has had and unfortunately will continue to have many examples of individuals whose convincing presence and self-confidence have led races, nations, organizations, and groups far astray before the real shortcomings of the leader were exposed.

If we are intent on doing a good job of conference leading and make the necessary preparations for it based on a knowledge of conference processes, we shall be able to recognize and control situations as they arise, unless our apprehension overcomes our calm good sense. Failure usually comes from a lack of knowledge of the conference processes, which makes it difficult for us to recognize what is happening in the course of a discussion and to adjust our procedure to meet it.

SITUATIONS AND PROBLEMS ARISING OUT OF THE LEADER'S OWN ACTIONS

As in many of life's situations, in conference leading we unconsciously and involuntarily create many of our problems ourselves unless we are on guard and act accordingly. The leader's actions, as we have pointed out, are closely interwoven with his traits and characteristics; however, the following three situations directly traceable to the leader's actions warrant our consideration at this time.

1. The conference group gets completely out of control and indulges in horseplay.
2. The group "gangs up on" leader.

3. The subject being considered is lost sight of in the course of the discussion.

The greatest fear of the new conference leader is that the group will get entirely out of control. This seldom happens if the leader is on the job and alert. When it does, as a last resort a recess can always be called. Once there has been a complete breakdown in group control, it is difficult to get them back on the beam. General horseplay is usually the leader's fault even though the group deliberately gangs up on him. If the group is just trying to take the leader for a ride, he should take it for sufficient time to show that he is a good sport and then attempt, through the use of reverse and relay questions, to throw the discussion back to the group. Ganging up on the leader might, of course, be due to some condition resented by the group as a whole which the leader has no authority to change. He can then make the discussion constructive by turning it into a consideration and a summation of recommendations to be brought to the attention of the proper authority.

Losing sight of the subject under consideration is a common and readily recognized occurrence in day-to-day business conferences that do not have proper leadership. It is easy for a group unintentionally to digress gradually from material directly related to the subject to that closely related, then to that slightly related, and finally all the way into unrelated material. An utterly sincere and intent discussion can creep away by almost imperceptible steps into some minor offshoot of the intended subject. This tendency in many instances comes from one of the group members who is particularly concerned with a certain phase of the subject insisting that it be discussed. If the leader is not on the alert to shape the discussion back into the desired channel, the group will not be averse to discussing the offshoot of the main subject unless some other forceful group member who is of the cold-logic type brings it back on the beam. As a general rule, when the discussion stays in an unrelated or slightly related zone, it is the leader's own fault. At times the leader may deliberately stop the discussion of the subject which he intended to explore in order to reach a conclusion on a side issue that the group has brought up but this is done as a result of a definite plan formed on his feet, so to speak, during the discussion.

An illustration of this would be a conference where the subject under discussion by a group of supervisors was the distribution of overtime work among employees in a group in such a manner as to give fair distribution and, at the same time, select employees with skill high enough to do a satisfactory job. Let us assume that the supervisors are not paid overtime and that the rotation to date has been determined by the superintendent. During the course of the discussion of the proper way to distribute the employee overtime, one or two of the supervisors in the group, who feel that the rotation of supervisors should be on a seniority basis, interject some remarks relative to it. As the members of the group themselves are vitally concerned with this subject they immediately drop the consideration of the problem offered and open a lively overhead discussion. The leader may decide to shape this item out of the discussion and get back on the original discussion. After several attempts, he may succeed in doing so but, in most instances, the discussion will be reopened when some chance remark slightly related to it provides an opportunity. Experience shows that shaping such an item out of the discussion will be very difficult and that it will quite likely keep popping back into subsequent discussions whenever a slightly related tie-in is offered.

The leader has two choices. One is to stop the original discussion, and devote a little time to this problem. If he happens to be the one in authority, he can either decide the question or, after sufficient discussion, state that he will consider it and reopen the discussion later on. If he does not have the authority he can listen to the discussion, get the pros and cons, and then get a recommendation acceptable to the group which he will submit to higher management. His second alternative is to state that at the end of the conference some time will be devoted to discussing problems the group might wish to bring up, and defer the handling of it until then. This second alternative does not work too well where the group has strong feeling on the subject for it will tend to keep coming up in the discussion regardless of attempts on the part of both the leader and the group to keep it down.

In actual practice, many good conference leaders review the subjects they plan to discuss very carefully and do some advance thinking as to what might come up as the result of what they know are vital problems to the group concerned. Such a study

is often helpful for, if a particular grievance exists in the group, something is bound to be mentioned during the conference with enough relationship to it to give the group a chance to open a discussion of the grievance. The leader can then see if he can get the necessary ammunition to take care of it or decide whether he will shape the discussion into a recommendation to be referred up the line.

Such planned digressions are not in any way comparable to those situations in which the group merely strays from the subject and is not brought back to it because the leader for the moment is not alert and careful in his guidance.

THE GROUP'S ACTIONS AND REACTIONS AS A SOURCE OF CONFERENCE PROBLEMS AND SITUATIONS

The group's actions and reactions will give rise to by far the greatest number of situations and problems in conference leading. Frankly, these situations and problems are just what makes conference leading an absorbing experience. Only in the practice conference leading session or in actual experience do we get their full significance and a knowledge of the ways to handle them. Let us look at a number of the typical situations that might be encountered and discuss enough of them to give some ideas as to the methods for their handling.

1. Group won't talk.
2. Group talks too much.
3. Group possesses insufficient Zone A information.
4. Group refuses to accept the discussion conclusion desired by the leader.
5. One group member is opposed to the leader.
6. One group member is objectionable to the rest of the group because of personality or views.
7. Group members indulge in personal abuse of each other.
8. A radical, nonconformist individual is in the group.
9. One group member is a timid, self-effacing person.

When a group won't talk, there is usually one fundamental reason—the group members feel that they are on the spot and that what they say may affect their standing on their jobs. This can sometimes result when the leader is the boss and is intolerant or dominating. However, if he is tolerant and does not put them on the spot the group will seldom refuse to talk with the boss as

the leader. In fact, the boss who handles the group skillfully can be an asset as a leader rather than a liability.

A lack of response on the part of the group usually means that the purpose and scope of the meeting were not properly set up and that the group members are uncertain whether what they say may be held against them. The leader should be careful, particularly in training conferences, to guarantee the confidence of the group by assuring them that what takes place in the group will stay there and will not be broadcast.

In day-to-day business conferences, the gathering of people constantly associated together in a business way breaks down some of the barriers. Conversely, it erects others in cases where the group includes certain individuals with authority who also have a reputation for intolerance and dominance. These cases are rare but the leader must be prepared to meet them as best he can; otherwise, the only way to cope with them is to shape the intended conference into a Type 1 or 2 meeting.

Our previous study of the involuntary mental reactions of people gives us a direct lead as to the one subject that will make any individual or group talk. That subject is, of course, the thing in which he is the most interested, knows the most about, and consequently is an authority on, himself. When discussion lags or is difficult to start, a question relative to an individual's own experience, phrased in a commendatory way, is an almost infallible means of getting him to talk. After several group members have made contributions, the reserve of the group should be broken enough to permit discussion.

When the group talks too much, the situation is much healthier than when it won't talk at all. The position of the leader at the head of the table gives him certain rights which are unconsciously recognized by the group. His lack of interest in a discussion, cannot help dampening it; if he takes over the discussion and closely shapes it, he obtains direct control of the degree of participation. Direct control sometimes has to be resorted to in a Purely Developmental conference but it is the natural and most used method of operating in the other two specific conference discussion processes.

We have already discussed one of the most striking situations in which the group will tend to talk too much, namely, that in which the group members themselves have a subject of vital

importance which they are going to bring up during the conference regardless of what may be interposed. Such a situation is by no means detrimental since, by allowing sufficient discussion of it to convince the group that their ideas and reactions really count and can achieve something, the leader sets up an atmosphere that guarantees him good participation and cooperation from the group.

When the group does not possess sufficient Zone A information to permit a Purely Developmental or Shaped Developmental discussion, the leader must interject it and the conference becomes, at least for a brief period of time, an Informational discussion. The extent of the Informational discussion may be quite brief as the discussion can be changed to Shaped Developmental or even Purely Developmental as soon as the group has acquired sufficient Zone A information. The Zone A information needed may be interjected by the leader through the use of specific problems for individual group members to answer so as to develop the needed information, or it may be deftly inserted as part of an illustrative experience recited by the leader. If desired, the information can be given on a directly Informational discussion basis. In the Purely Developmental or Shaped Developmental process, it is best, if possible, for the leader to find some way of supplying the information to the group without their being too conscious of it and then let them develop the ideas as their own. This is in direct agreement with what we have learned about our involuntary mental reactions and inferiority. When a definite Informational discussion process is used, the leader rather than the group is established as the authority and the problem of inferiority should not be present unless the leader inspires it through his own actions.

Only in an Informational conference discussion can the group refuse to accept the discussion conclusion desired by the leader, since it is characteristic of the Purely Developmental and Shaped Developmental discussion processes that the group, not the leader, sets up the procedure or conclusion. This situation presents a rather fundamental problem to the leader. In occasional instances the leader may have erred in setting up his own conclusions. When such is the case, he must tactfully and skillfully interject his admission of error and acceptance of the group conclusion in such a way as to build the group up and at

the same time not destroy his standing as the authority. Such situations are not unusual and do not give difficulty if the leader sets up premises beforehand to the effect that he is not perfect, does not claim to be perfect, and will probably make mistakes. If he does make an error, he should admit it frankly to the group and, if he does not have the information available, secure it and present it at the next session. When he makes such a promise he must take care to live up to it. We do not resent an admission of humanness, but we do resent the leader setting himself up as an infallible being who cannot be wrong as this is bound to inspire inferiority and resentment.

When the group members are wrong in the conclusion they have reached, then it is the leader's job to make them realize their errors, if possible by developing them in such a way that the correction comes from the group rather than directly from the leader. If checks of the group fail to disclose any individual with at least a few doubts about the conclusion who can be used to start a discussion which may be shaped in the right direction, the leader sometimes finds it effective to reverse his own position as an authority. However, he must do it in such a way as to throw the burden for opposing his acceptance upon the group, by exploring the positive rather than the negative which the group has shown tendencies toward accepting in spite of the leader's shaping. Only through comparative discussion will the leads to the correct solution be developed. It is a timeworn and honored axiom that when an impasse is reached on advantages, try disadvantages. The leader must not forget that, in an Informational discussion, he must be careful to handle Step II properly and give out his *Zone A* information so that it will provide the natural leads for shaping the discussion in Step III, Acceptance.

When the leader knows in advance that one of the group members is opposed to him for personal or other reasons, he should place him in the blind spot at his left whenever it is possible to do so. This will give some control over the situation. When this is not possible or where it does not give the necessary control, the leader must resort to other devices. Chief among them is controlling the discussion so that the group itself rather than the leader exerts the necessary controls over the offending member. Very often, this will take place naturally for the group will sense unfair tactics and sharpshooting and adjust the matter

during an intermission or through remarks made in the conference. When the leader finds the offending individual eager and ready to oppose actively everything he advances, he can turn this very eagerness back upon him by carefully phrasing a series of statements or questions in such a manner that they will be absolutely correct with respect to the conclusion desired. When the offending individual opposes them, the leader can then shape the discussion so that the group brings out the correct conclusion and puts him in his place, so to speak. After this has happened two or three times, it is seldom that anyone will risk gaining the reputation of being always wrong or, worse, of obviously and unfairly hectoring the leader in continued opposition to the group's expressed convictions.

In isolated instances, it may develop that one individual is objectionable to the rest of the group because of his personality or views. To the inexperienced leader, such a problem presents many difficulties and, if not handled skillfully, may set up conditions which prevent satisfactory, free discussion. If the leader has had no advance indication of such a possibility arising, he must attack it on an as is basis. His first move, after he has determined as a result of the group's reactions that the individual is actually objectionable to them, is to decide whether there is any justification for the group's attitude. If the group's ideas do not seem to be founded upon real justifiable reasons and the duration of the conference series warrants it, or if the same group meets regularly in day-to-day business conferences, the leader is faced with the problem of adjusting the group's ideas. This is the same as any other problem in group acceptance except that it must never be a major objective or subject for group discussion but rather an indirect objective which will be attained without the group's realization of its gradual achievement. This is best done by definitely limiting and restricting the objectionable individual's participation in Step II, Drawing Out, and Step III, Acceptance. His participation during these steps should consist chiefly of assenting to, verifying, and restating things expressed by the leader or, in some instances, absolutely inescapable sound ideas that the group members cannot oppose without placing themselves in an obviously untenable position. Even then this individual's participation must be only occasional and infrequent until the leader senses that the group's feeling is wearing down.

The objectionable individual can be used slightly more in the discussion in Step IV, Summation, where he can be checked and used to assist in summing up things that the group cannot logically refute after acceptance. The leader must be reasonably sure that the individual concerned has attained some degree of acceptance with limited participation.

The limited participation of the objectionable individual and the fact that he advances only ideas which concur with the group's accepted conclusions will gradually build up some acceptance of the individual himself. In cases where the individual's own personality prevents this, the leader has no alternative but to resort to shaped operation and reduce his participation to an absolute minimum, sacrificing the expectancy of that individual's acceptance to the greater need for group acceptance.

If the leader's quick check develops that the individual's objectionable qualities as viewed by the group actually exist as such, he must consider the desirability and possible effectiveness of private discussion with the individual with a view to modifying his ideas and actions. Such a course is seldom warranted for single meetings or a brief series of conferences but it is incumbent upon the leader in instances where such an individual is a member of a business organization and a regular participant in day-to-day conferences. Unless the leader is the supervisor of the individual, the private interview will have to be held from the standpoint of purely friendly interest; or it may be referred to the individual's supervisor who, no doubt, is already aware of the condition and the need for action.

When heated arguments between individuals take place or when two members of the group indulge in personal abuse of each other and the usual distracting moves such as the conference leader rising from his chair and moving over to the board have no effect, rather extreme measures may be necessary. One conference leader who found himself in such a situation contrived to knock over the blackboard; another fell over his chair. Such violent interruptions, with the rush of the group members to retrieve the situation, seldom fail to break up the byplay, and the leader can take advantage of the interruption to regain control. In cases of continued personal abuse of each other, the leader may have to take the offenders aside, point out the obligations of all group members to the group at large, and attempt to

secure their cooperation. This should not be done in the presence of the group. In general, whenever the leader senses that a discussion is getting tense, he should anticipate possible difficulties by turning the discussion on himself, for he can then shape it as he desires.

Although the radical individual's viewpoint and approach are a little different, the same basic ideas as to handling apply as in the case of the individuals who are opposed to the leader or objectionable to the rest of the group. The timid and self-effacing group member is drawn out of his shell chiefly by using him at first only on items on which he is definitely a Zone A authority. This builds him up with the group as well as with himself and gives him the confidence he needs. Furthermore, he will tend involuntarily to support this type of material and talk upon it, because it is an "I want" item in a business conference owing to the competitive angle and an "I want to be" item in a training conference. The leader can help this build-up along by occasionally deferring to the timid individual as an authority and seeking his opinion. In most groups, the leader will find that many of the group members are his staunch allies in this procedure for they cannot help sensing the strain and tenseness in the timid individual's manner. We must not forget that contributing an experience of his own as an illustrative example will do much to put him on the right footing. In the average business where groups meet regularly, such individuals are known and appreciated. Sometimes, however, the more forceful, dominant group members tend to override them upon occasion when the competitive motive creeps to the fore. The leader must remember that timidity results from a distinct fear of criticism, error, or failure while shyness is due to a tendency to shrink from observation with a resulting desire for self-effacement.

OUTSIDE DISTRACTIONS AS A SOURCE OF SITUATIONS AND PROBLEMS

There are three general sources of outside distractions:

1. Interruptions.
2. "Brass hat" visitors.
3. External noise.

Conference situations and problems that are the result of outside distractions are separate and apart from the leader's

control and not directly susceptible to his attitude. People breaking into the conference room to speak to an individual or to deliver messages are bound to distract the group and interrupt the conference procedure. The only sound handling is to stop the conference proceedings until the distraction is ended. Otherwise, the best the leader can hope for is divided attention, and no conference can be successful under such conditions. The leader does have some control of interruptions in a purely training conference where he can isolate the group from such contacts by having it definitely understood that neither he nor the conference members are to be contacted except in extreme emergencies. It is best, of course, to provide a secretary in an outer room to receive telephone messages and give them to the conference leader and the individuals concerned at the next intermission. In day-to-day business conferences interruptions are likely to be much more frequent than in purely training conferences, but they must be held to a reasonable minimum or the whole conference is disrupted. Wherever possible, arrangements should be made to have all telephone calls and contacts of group members come through a secretary who can weed them out and permit only those of sufficient importance to be given to the conference leader. Once this procedure has been established people will assume that it is a part of any conference. As is discussed in a later chapter on conference settings and arrangements, the majority of business and industrial organizations provide conference rooms designed for conference use only which separate business conferences from the regular flow of business and permit them to proceed in an orderly, well-organized manner. Obviously, such arrangements do much to control interruptions from outside sources.

It has long been an axiom of conference leadership that whenever a top-flight official or "brass hat" drops in just to sit in on the conference, it dries up and practically dies, for the group members start covering up immediately. This is a natural reaction since the group feel that any mistakes in judgment or any ill-chosen comments they might make will shape the official's ideas as to their competency and efficiency. They fear that these impressions may be retained since they neither come in regular daily contact with top-flight officials nor have the opportunity to give them a broad base for judging their ability. This is not

always true, for there are some high officials who can drop into a conference and it still continues on a free, open-discussion basis. The fallacy in the situation lies in the fact that it is difficult for an official to judge his own capacity in this respect. In general, the conference leader should be guided by his knowledge of the officials and, whenever possible, to arrange for such visits in advance with the understanding that they are to be limited in duration. The best all-round plan is for the leader to stop the conference, have the official take over and make a brief talk, and have a discussion follow. After the completion of the visit, the conference can resume on its regular basis. Where it is necessary for an official to attend the conference on a part-time basis, the leader will have to be guided by his knowledge of the particular individual. Some officials are so constituted that they automatically operate on a Type 1 meeting basis instead of a conference basis. When such is the case, there is no answer other than to let the conference operate on a Type 1 meeting basis with the leader indicating that the official is to take over. Much can be done to overcome such situations by giving an appreciation of conference leadership to higher officials; when they realize the problems and principles involved, including the possible types of meetings, they will cooperate, in addition to selecting the type of meeting that best meets their objective. It goes without saying that errors made in this respect are errors of omission through lack of appreciation rather than errors of commission. A knowledge and appreciation of conference leadership not only equips leaders but also provides conferees with training on how to attend a conference. Even when a "brass hat" is well acquainted with and skillful in the use of conference leadership, it is usually an ill-advised procedure for him just to sit in on a conference without being an actual participant owing to the fear on the part of the conferees that they may make a poor impression.

The third source of outside annoyance, noises and other continuing sources of interference that may be heard in the conference room, are due to the conference setting. If they cannot be corrected, they must be endured. Where they are continuous rather than brief and infrequent, steps should be taken to correct them or to relocate the conference. When conference settings are provided along the line we shall discuss later, such distracting influences should be considered and eliminated.

**THE INTANGIBLE FACTOR IN HANDLING
CONFERENCE SITUATIONS AND PROBLEMS**

Peculiarly enough, there is a very definite intangible factor in the handling of conference situations and problems. Sometimes it is dignified by the phrase "getting the conference on the right emotional plane." We all have experienced the almost subconscious interchange and understanding that takes place between a group and a speaker who has the faculty for gradually building the group up to a level of interest and, in some cases, emotion, which focuses their every faculty upon what he is saying. Although this emotional build-up has little factual basis, there is no question as to its existence and it cannot help playing a most definite part in a conference discussion. In order to get the group on this emotional interest level, the leader must be able to conduct an interesting, well-handled, and tactful conference so that there is a feeling of freedom of participation as well as absorbing pleasure in the conference process. This intangible atmosphere is a by-product of the leader's attitude, which we have previously mentioned as the major influencing factor concerning conference situations and problems arising out of the leader's and the group's actions and reactions. The leader will not achieve it from too conscious a striving for it but rather from devoting his every faculty to handling the discussion on an understanding, tactful basis. This is most definitely tied in with the leader's traits and characteristics which we shall discuss in the next chapter. However, sincerity on the part of a mediocre leader will overcome many obstacles, with the result that he will often get much better conference results than a more gifted man whose sincerity and devotion to the job are somewhat passive.

Nature provides a conference leader with a definite indication as to whether he is keeping the discussion alive and interesting to the point where a real exchange is taking place. When the group members frequently shift their positions in their chairs and exhibit the usual signs of fatigue from sitting, it is proof that the interest is not sufficient, providing that the usual break features have been given. As one old-timer put it, "I can tell when it is a good conference by whether or not I am tired of sitting down."

**ACTUAL EXPERIENCE NECESSARY TO THE DEVELOPMENT
OF SKILL IN LEADING**

As we read this chapter, we must remember that when we are considering the situations and problems that might arise in a conference, we are devoting our attention to the darker side of the problem and painting a rather black picture of the process. In actual practice, many of the situations that we have discussed seldom, if ever, arise in a day-to-day business conference and only occasionally in a purely training conference. However, the leader would be ill equipped if he did not have the feeling of confidence that comes from a knowledge of what can be done to cope with these situations if they should arise. The handling of situations and problems in conference leading is best learned through practice leading sessions in leader training conferences and in actual conference leading. The discussions which follow practice leading sessions give an opportunity for bringing up actual situations and comparing the handling given them with what would appear to be the best solution. In fact, solutions can be much more readily and easily worked out in a discussion than explained in words. The actual experience of coping with such problems, supplemented by discussion and constructive criticism, constitutes the most effective way of learning how to handle them. Where this is not feasible, a reading knowledge of the possible situations and how to handle them supplemented by conference leading experience is indispensable.

A conference leader can surmount by training and experience any situation he may meet. All of us can develop through experience and training, the necessary technique. True, some few situations are more easily handled if we happen to have native ability along the lines required, but, only occasionally does an individual lack the necessary aptitude to a degree that affects his effectiveness as a conference leader. It is most important that the leader be constantly on the alert and be aware of the significance of what is taking place. He must sense the trends and directions of the discussions so as to have the questions necessary to guiding the discussion ready for spontaneous use without delay. He must keep ahead of the group at all times, for the timing of questions and the fitting of them into the

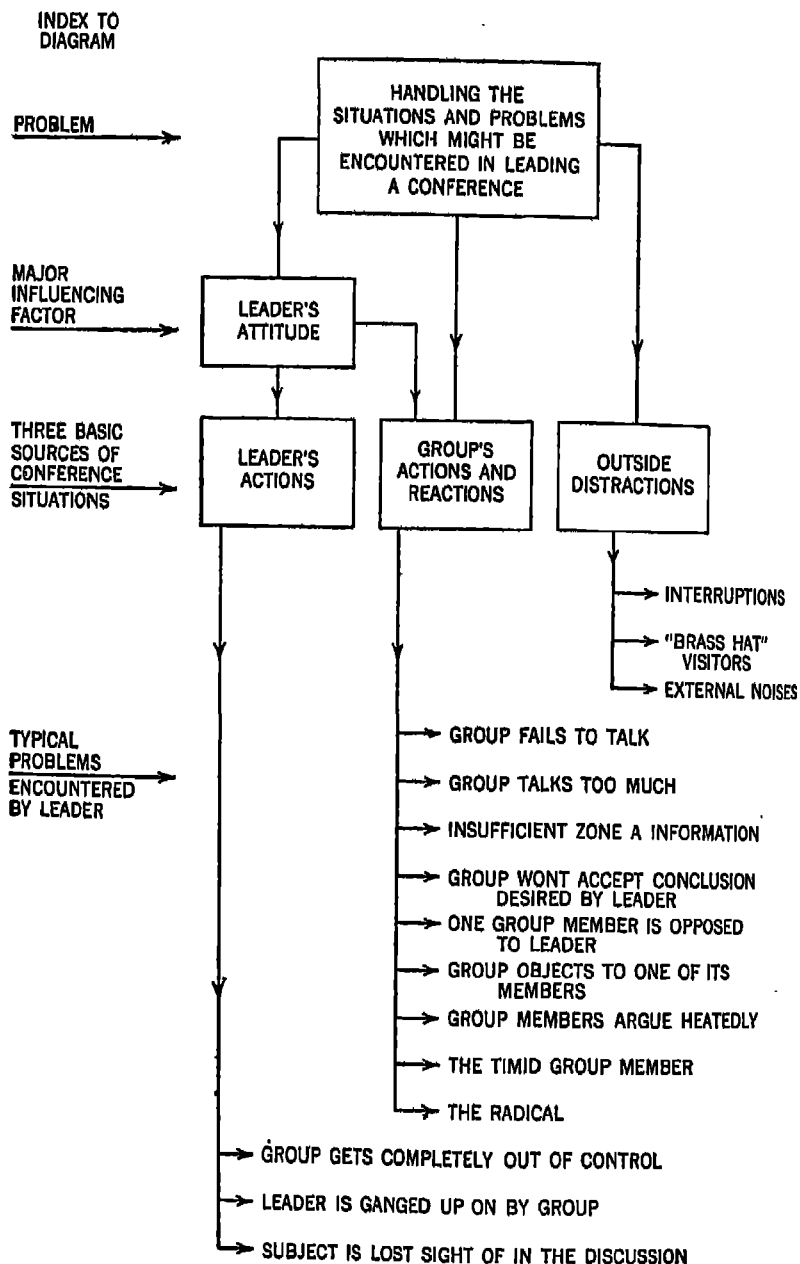


FIG. 18.—Flow diagram summarizing Chap. XI.

discussion in a natural way have much to do with the direction the discussion takes.

MATCHING QUIZ

Match the proper letter to each number so as to get complete correct statements

- | | |
|--|--|
| 1. Each group of conferees develops an over-all group personality based on the mingling of individuals and | A. training and experience. |
| 2. A knowledge of how to handle possible situations in conference leading helps the leader until he has gained | B. control of the group. |
| 3. Conference situations may develop from | C. himself. |
| 4. The three possible sources of conference situations are | D. the attitude and skill of the leader in conducting the discussion. |
| 5. The leader's attitude influences the first two of | E. best learned through actual practice in leading conferences. |
| 6. Conferences are never held just to get group acceptance of the | F. interruptions, "brass hats," and external noise. |
| 7. The greatest fear of most new leaders is losing | G. apprehensive or afraid. |
| 8. The group's actions and reactions will give rise to the majority of | H. the three possible sources of group situations. |
| 9. The subject that everyone is sure to be interested in is | I. the group at all times. |
| 10. The three main sources of outside distractions are | J. the leader's own actions, the group's actions and reactions, and distractions from outside sources. |
| 11. The handling of conference situations is | K. the significance of what is taking place. |
| 12. All the situations met by a conference leader can be surmounted through | L. three basic sources. |
| 13. It is most important that the leader be constantly on the alert and aware of | M. the situations and problems in conference leading. |
| 14. The leader must keep ahead of | N. the superiority of the leader. |
| 15. Conference situations are best handled by the leader when he is not | O. firsthand experience of his own. |

Answers: 1D, 2O, 3L, 4I, 5H, 6N, 7B, 8M, 9C, 10F, 11E, 12A, 13K, 14I, 15G.

CHAPTER XII

DESIRABLE TRAITS AND CHARACTERISTICS OF A CONFERENCE LEADER

INTERRELATION BETWEEN THE CHARACTERISTICS OF THE GROUP AND THE LEADER

The old adage "No one lives wholly unto himself" is most aptly illustrated in the way that our individual personalities, reactions, and responses are influenced by those around us. The average individual seldom has a completely unconditioned reaction when he is a member of a group or working with another individual. Man is by nature a gregarious and sensitive being and cannot help being influenced, to some degree at least, by the thoughts, actions, and attitudes of those with whom he is associated. The closer and more personal the association, the deeper and more lasting these influences will be. However, even the most fleeting, temporary associations have some effect. In our modern existence where we spend approximately one-third of our daily lives in close association and contact with the members of the business or industrial group of which we are a part, it is inevitable that we respond to the influences to which we are subjected. Even though they play second fiddle to the more deeply seated personal associations within our families, their importance, as the means through which we earn our livings and build our careers, makes them affect us deeply.

Because of the interplay and interdependence of our reactions upon those about us, the material covered in this chapter and in the three preceding chapters is difficult to separate out and isolate completely under each of the chapter headings. Questions and their use in conference leading, the characteristics of individuals, situations and problems in conference leading, and the desirable traits and characteristics of a conference leader are all interdependent since they deal with people and the situations through which their reactions, one upon the other, are expressed. As a result, no one of this group of four chapters can be considered

apart from the others for they actually form an over-all entity which has been broken down merely in an attempt to handle them intelligibly.

NO FORMULA WHICH FITS ALL LEADERS

Much has been written on what constitutes a conference leader from the standpoint of desirable traits and characteristics. At best such material is vague and general since there is no specific formula which will fit each and every individual. It is valuable for providing a starting background based on the experience of others. It enables the new leader to avoid some of the more obvious pitfalls and gives him a sense of security during the period when he is getting enough actual practice to gain facility in conference leading procedures. As has been brought out, presence in a conference leader is essential if he is to inspire confidence in the group members; presence is gained through the feeling of security that results from having some guide to follow until the newness has worn off and we have developed our own background of experience in terms of our own natural reactions.

Facility in conference leadership comes only with experience. Each leader develops his own style in the same way that each individual develops his own golf swing. One of the most striking examples of the law of differences lies in the differences between individuals. No two human beings are exactly the same; if we attempted to set up in detail the specific traits and characteristics of a conference leader, we not only would fail but would prevent achievement of a skillful leadership technique by trying to shape all individuals to the same pattern. Therefore, in practicing the principles contained in this chapter we should not attempt too much self-analysis. We should consider each characteristic mentioned from the viewpoint of what constitutes the safe, accepted standard and try to develop a technique which includes them.

VITAL IMPORTANCE OF SINCERE ENJOYMENT OF DEALING WITH PEOPLE

The first and most important characteristic of a conference leader is that he really should like and enjoy dealing with people. It is true that some of us have certain aptitudes and talents to a greater degree than others; we seldom find an individual, how-

ever, who, cannot develop into at least a reasonably good leader if he is sincerely interested in people and enjoys his contacts with them. Devoting one's every thought and action to doing a good job and excluding everything else from one's mind while doing it is an excellent antidote for a lack of a deep-seated enjoyment of working with people. It is surprising how the ability to do something well will, through our own contributions and efforts, involuntarily instill in us a liking for the thing we have created.

The first question that enters our minds when we are confronted with a new job to do which uses unfamiliar skills is whether those new skills require natural aptitudes that we may not possess. We all have a fear of being forced into a task for which we have no natural ability. We dread the terrific strain of working against almost insurmountable obstacles together with the feeling of inferiority which it brings forth. We do not fear things that we know can be acquired by the great majority of people; in fact they serve to challenge our instinctive resourcefulness and will to do. Practically all the more desirable traits and characteristics of a conference leader can be acquired, although natural aptitudes affect the degree to which some of them will be. Luckily, the variations in personal characteristics of individuals often compensate for deficiencies in individual traits. In practically all instances what is lacked in one trait or aptitude is more than offset by the strength of the others.

IMPORTANT ATTRIBUTES OF A GOOD CONFERENCE LEADER

In order to aid our consideration of the more important attributes of a good conference leader, they are listed below:

1. An active, quick-working mind.
2. A free oral expression.
3. Ability to sum up and evaluate.
4. Ability to keep enough ahead of the discussion to sense its trend and plan ahead.
5. Ability to draw illustrations from one's own experience.
6. Ability to sense and appreciate the personal reactions of people for a particular situation.
7. A proper sense of humor.
8. A spirit of humility, in the sense that the good of the group always comes first.
9. A lack of executive complex.

10. An even temperament—freedom from emotional swings.

11. Ability to perceive significance of what is said as it relates to discussion trends.

We shall not attempt to treat each of these characteristics and traits in detail but shall cover a few of them briefly in order to indicate their general nature. It is during the practice sessions held in the training of conference leaders that situations will arise upon which we can capitalize to bring out many of the traits it is difficult to discuss effectively. If the proper atmosphere and conditions are set up, the group will not resent the use of group situations and problems for its over-all benefit in understanding the attributes of a good leader.

TIMING THE LEADER'S THINKING

There is no escaping the fact that some people think more quickly and actively than others. In conference leadership, it is essential for the leader to be constantly alert and sense the trends of the discussions, at the same time forming in his mind possible guiding questions and statements slightly in advance of the need for them. There are many devices that the leader can use to gain a little time when he wishes to consider his next step. A change from closely shaped operation to a brief period of overhead operation will accomplish this, as will a "why" type of question to a group member who has just made a contribution. The leader must always remember that, in addition to expanding the discussion in a vertical sense, provocative questions can keep it from moving forward while he forms his ideas as to the trend it is taking. It is most desirable that the leader's timing and handling of the discussion coincide with its flow and that he not get ahead of or behind the group pace.

THE TRUE MEANING OF FLUENCY

Fluency of expression does not always mean a rapid, overwhelming flow of words. In fact, it really means something altogether different, for speed and volubility do not make an impression or convey ideas. Often, they merely confuse the issue. Fluency means an adequate rate of talking to keep the listener's mind activated to the point where it does not wander off between words, phrases, or statements. The choice of words and their combination into phrases must be clear and lucid. We

often forget that occasional periods of time to digest what has been said are required; too heavy a rapid-fire flow of words does not provide it. Occasional pauses are essential; unless they come at the wrong time and are so long as to be awkward, they are effective in giving the group members a chance to make the mental comparisons and adjustments necessary to zone shifts.

Another failing in fluency which is very hard for the group to counteract is the tendency we sometimes have to string unjoined phrases and sentences together without completing any of them. We must take care to speak in complete phrases and sentences so that each thought is properly expressed. These are the things that make up fluency, not merely the ability to talk glibly. There are many people who might appear to be slow in their thought and phrases but whose clarity and lucidity, when coupled with their sincerity and application to the subject in hand, give a most pleasing feeling of achievement and interest to the group.

EVALUATION AND SENSING OF DISCUSSION TRENDS

The ability to sum up and evaluate a discussion is, of course, perfected through conscious use of it. Proper planning and consideration of the conference material coupled with alert attention to the conference discussion does much to achieve it. A conference leader should always check each statement made by group members from the standpoint of whether it is directly, closely, slightly, or not at all related to the subject under discussion. He will thus be able to compare and reject ideas not pertinent to and not drawing out or advancing the discussion.

It is important to keep a conference alive and colorful. To do this the leader must be able to draw illustrations from his own experience and evaluate his own background. He should use it to round out ideas and situations presented by the group so as to cause them to explore and evaluate them and reach conclusions with respect to them. All the experiences and illustrations used do not have to be bona fide personal ones, although those are usually the best. Much of a leader's effectiveness in using his leadership technique is due to background and experience. After having obtained information as to the methods and conceptions of conference leadership, leader training groups should devote a portion of their time to practice leadership. This equips the new leader with sufficient background and experience to last him

until he has developed his own personal method of handling. Ability to put ourselves in someone else's shoes in a given situation and to estimate what his reaction will be is something we should develop if it is not natural with us. It is this quality which helps the leader to choose the right individuals for participation in the discussion at the right time.

PROPER USE OF HUMOR AND HUMILITY

Humor is the escape valve through which either a tense or monotonous situation is relieved. Without it the human nervous system could never stand the strains and impacts of life and the number of breakdowns would be tremendous. A proper sense of humor is an essential requirement in a conference leader. This does not mean that he should be a comedian or a jokester, for the conference is not a show set up to get group acceptance of the cleverness and personal superiority of the leader.

Humor does not mean just the ability to tell a funny story and get a laugh out of the group; neither does true humor carry a sharp edge which, through sarcasm or ridicule, provokes laughter at the expense of one individual. If it is to live up to its really constructive function in life, humor must avoid increasing tenseness and strain in a group or an individual. As far as the conference leader is concerned, a proper sense of humor is evidenced by the ability to take the sting out of situations both for the group and for an individual. This is done by seizing upon the impersonal, ridiculous, and absurdly incongruous elements in a situation and drawing attention to them in such a fashion that they excite the mirth of the group. This is often done by a comment or an aside or by relating an incident or a story which is recalled to the leader's mind. Such incidents should be treated as break features and moments of relaxation. They should be kept well in hand and controlled by the leader so as to serve his purpose without giving the group the impression that any one of them can break in and tell a funny story or divert the group's attention at any time.

A conference leader should always focus any situation with a sting in it upon himself, drawing it away from the group or the individual through the use of some transitional remark. Humor is never true humor unless it provides a release of tension without stirring up the same type of reactions it seeks to eliminate.

Before we say too much about the necessity for the conference leader's having a spirit of humility, let us clarify what is meant by humility from the conference leader's viewpoint. Humility is generally defined as "the quality of being humble, courteous, and kind." These general terms must be clarified to some degree before we can apply them in conference leadership. Courtesy, kindness, and patience are indispensable requirements in a conference leader. In most of us, our desire "to be" crowds out our tendencies toward humility. Our ego and self-pride are always goading us on to show how smart and clever we are, regardless of whether we do so at the expense of other people. A conference leader must have or develop to a reasonable degree consideration for others and a sincere desire to put the good of the group above his own. Some of us are naturally inclined toward modesty and a humble estimate of ourselves in comparison with others or with the demands of a common undertaking. Others among us tend to keep the competitive elements of life in the forefront of our thoughts and tend to seek those things in all situations which will advance us personally. All of us need to give this angle of conference leadership constructive thought and to make definite efforts toward humility and modesty. No one ever really sees anything as a result of a piercingly bright flash, for it only blinds. The steady light adjusted for easy comfortable sight is the one that permits us to see and recognize what is placed before us.

THE PITFALLS OF EXECUTIVE COMPLEX

As we have seen, it is a most natural human desire to want to be the "big shot" and tell others what to do instead of having to do it ourselves. We are all inherently lazy and only by constantly goading ourselves do we make occasional efforts to think and act. We always involuntarily seek the easiest way out. As a result, mentally as well as physically, we like to make the utmost use of the upholstery with which nature provided us in order that we might be comfortable in a sitting posture. The best and most descriptive term for this failing is "executive complex." We must constantly fight it if we are to achieve our goals. The conference leader, particularly, must fight executive complex because he must be active mentally if he is to be successful. Woolgathering and the habit of merely listening without evaluating and planning are fatal to conference leadership. The

leader is at the controls in much the same way as a pilot; unless he is sufficiently alert and is planning ahead all the time, his conference will fall into a tail spin just as readily as a poorly handled plane.

NATURAL EMOTIONAL CYCLES AND AN EVEN TEMPERAMENT

An even temperament with freedom from emotional swings and variations is a happy, likable, and important trait in any man but is particularly desirable in a conference leader or supervisor. The ability to discipline oneself is a fundamental prerequisite for leadership of any kind where one is entrusted with the guidance of others. It is an interesting and informative experiment for an individual consciously to record his own emotional cycles. This can be done by noting the dates upon which you feel so low in spirits that you could crawl under a worm without tickling him. These instances should not be confused with those moments of low-spiritedness attributable to definite causes. They are the days upon which we feel low in spirits and even irritable for no apparent cause when everything seems to be going all right. Some people have extremely long periods between these low points in emotional cycles while others have much shorter ones. In fact, some ill-advised supervisors fall into the error of appearing to have an emotional cycle made up only of extremely low points.

The majority of us soon learn that it is essential to normal business relationships to subdue the tendencies resulting from our emotional low points and those attributable to direct causes. The supervisor and the conference leader in particular must learn to display an even temperament at all times. True, this is not always easy; many times it takes a conscious effort on our part to achieve. It is one of the important responsibilities of all leaders to achieve emotional stability insofar as possible. Freedom from the swings resulting from our own emotional cycles and the normal tendency to crusade and campaign violently for things that we personally feel strongly about make the well-balanced individual. Remember that when we are angry, we should deliberately speak in a low, unhurried, and considerate tone, as this automatically puts a damper on our emotions.

Still again we find that the major factor in all the leader's activities is the ability to devote every iota of his mental and even

his physical energy to the things that he is doing. If he concentrates on the subject discussed and his handling of the group so as to achieve the necessary discussion and acceptance in such a manner that the group's experience will be both pleasant and profitable, he will lift himself and the group to that plane of subconscious emotional transfer that is beyond and above the interference of normal emotional cycles.

ABILITY TO PERCEIVE SIGNIFICANCE OF DISCUSSION TRENDS

Ability to perceive the significance of what is said as it relates to discussion trends is, of course, most important. As is indicated in the flow diagram which summarizes this chapter, it is the one desirable trait which is mostly inherent and cannot be developed or acquired if it is not present to a sufficient degree. Fortunately, this ability is generally present in a sufficient amount to permit its development to a point where passable success in conference leading can be attained. The lack of this ability is always painfully evident to the leader and many of the group members. Nothing is more injurious to orderly group discussion procedures than continued failure on the part of the leader to sense the trend of the discussion in sufficient time to shape it in the desired direction. The lack of sufficient aptitude in this connection must not be confused with the development and application of it, and a prospective conference leader's ability should not be judged until he has completed two or three practice leading sessions. All of us have to learn the technique involved and to practice the constant comparison and evaluation of everything contributed by the group members in relation to the discussion objectives and trends.

No doubt many of us can recall isolated instances of conferences in which the leader failed to perceive the significance of conference trends and members of the group actually had to shape the conference discussion from the side lines. In the everyday business conference, an appreciation of conference leadership by the group members gives them the necessary ideas on how to participate in a conference. Therefore, they can give the leader a good deal of unobtrusive assistance if a normally good leader has a few bad moments.

Although ability to perceive significance is largely an inherent trait, we must not forget that the leader who may have this

ability to a low degree can become outstanding through development and use of it, while a leader who has been given a high natural ability may do an indifferent job through neglecting the necessary development and application of the ideas that enable him to use his endowment.

JUDGMENT AS A FACTOR IN LEADERSHIP

If we had developed from a group the various traits and characteristics that make up a good conference leader, without doubt someone would have volunteered the idea that judgment was needed. We have not listed judgment because it is a general rather than a specific characteristic. Judgment has long been a requirement of a good supervisor. Just what do we mean by judgment as it refers to a conference leader? Is it inherent or can it be acquired? In a broad sense, judgment is a composite trait made up of experience, knowledge, and imagination. One of the more prevalent definitions states that *Judgment is the ability to meet a given situation in the best manner considering knowledge and experience possessed.* Another says that *judgment is the instinctive differentiation between facts from experience and knowledge.* The same set of facts, based upon the same knowledge and viewed from the standpoint of the same experience, will give different answers at different times and under different situations. The vague, intangible feature of judgment is the instinctive ability to visualize, which is called "imagination." It is controversial whether everyone can develop it. However, a conference leader would be said to use good judgment if he did the following things:

1. Sized up a situation quickly.
2. Caught an important or vital item.
3. Acted quickly.

No two people have all the characteristics listed in this chapter to the same degree. It is fortunate that this is so, for it is the variations in human personalities that give us our individual characteristics and make life the interesting experience it is. What one individual lacks with respect to a particular trait or characteristic is often balanced by a better than average portion of some others. These variations in natural endowment make it impossible for all leaders to find the same detailed technique effective. Through experience and training, supplemented by

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DIAGRAM

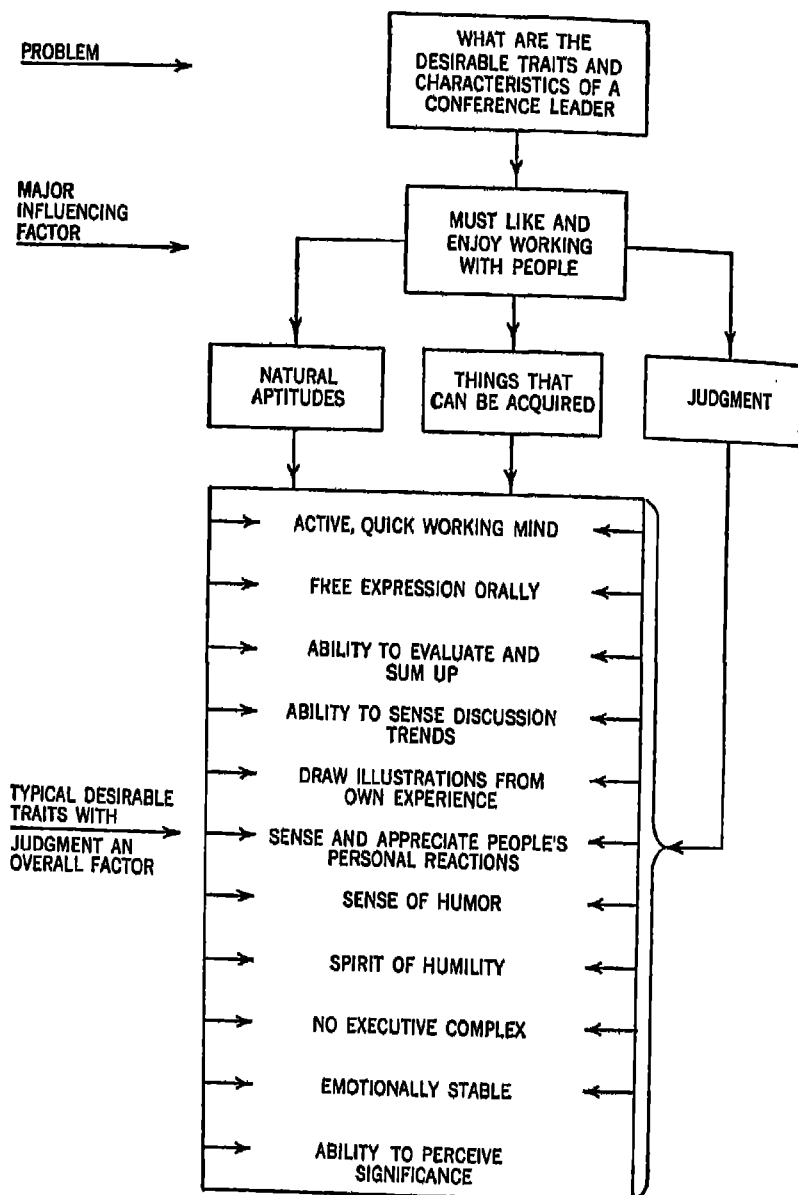


Fig. 19.—Flow diagram summarizing Chap. XII.

the constant attempt to develop the desirable and shape out the undesirable, an interesting, effective leadership technique can be formed. It is the over-all combination that makes the conference leader. Since detailed specifications are impossible to set up, we must keep in mind that the results he gains are the only real measure of a conference leader's ability. His characteristics must sum up so that he can get the proper distribution of zone knowledge and acceptance in a reasonable time and in such a manner that both the group and he find it a stimulating as well as a profitable experience.

TRUE-FALSE QUIZ

	True	False
1. Facility in conference leadership comes only with experience, and each develops his own natural style.	_____	_____
2. It is most essential that a conference leader like and enjoy dealing with people.	_____	_____
3. People instinctively like the things they do well.	_____	_____
4. We do not fear being forced to do something for which we have no natural aptitude.	_____	_____
5. The variations in personal characteristics of individuals usually compensate for deficiencies in individual traits.	_____	_____
6. A leader's timing and handling of the discussion must coincide with its flow, for he must not get ahead of or behind the group pace.	_____	_____
7. Fluency means an overwhelming flow of words.	_____	_____
8. Speed and volubility make impressions and convey ideas.	_____	_____
9. Care must be taken to speak in complete phrases and sentences so that each thought is properly expressed.	_____	_____
10. The ability to sum up and evaluate a discussion is perfected through use.	_____	_____
11. A leader is aided in selecting group members for participation in the discussion at the right time by being able to estimate other people's reactions in a given situation.	_____	_____
12. Humor is the escape valve through which a tense or monotonous situation is relieved.	_____	_____
13. A conference is really a show set up to give the leader a chance to demonstrate how clever he is.	_____	_____
14. The group should be made to feel that they can break in at any time and tell a funny story.	_____	_____
15. It is our desire "to be" that crowds out our tendencies towards humility.	_____	_____
16. No one likes to be a "big shot" and tell others what to do instead of having to do it himself.	_____	_____
17. Executive complex is highly desirable in a conference leader.	_____	_____

	True	False
18. Anyone who is to be entrusted with the guidance of others must first learn the meaning of discipline himself.	—	—
19. Even temperament and freedom from emotional swings are important traits in a conference leader.	—	—
20. Nothing is more injurious to orderly group discussion than the leader's failure to sense the trend in time to shape the discussion correctly.	—	—
21. Judgment, as it relates to conference leadership, is a general rather than a specific characteristic.	—	—
22. Judgment is the ability to meet a situation in the best possible manner considering knowledge and experience possessed.	—	—
23. In most cases what one lacks in a particular trait is usually made up for by an overabundance of another trait.	—	—
24. Average ability plus hard work and practice will make a much better leader than high ability coupled with executive complex.	—	—
25. The only real measure of a conference leader's ability is the results he gains.	—	—

Answers: 18, 19, 20, 21, 22, 23, 24, 25: True; 18, 19, 20, 21, 22, 23, 24, 25: False

SUGGESTED EXERCISES AND OBSERVATIONS

Check over your activities and reactions to see whether you really enjoy dealing with people. Keep a stroke record on the job and in your activities elsewhere to find out whether people come to you for other than business or absolutely necessary reasons.

STROKE RECORD

Activity	Absolutely necessary matters	Requests for advice and assistance	Purely social
Telephone calls:			
1. On the job.....			
2. At home.....			
3. Outside activities.....			
Voluntary personal contacts made with you by others:			
1. On the job.....			
2. At home.....			
3. Outside activities.....			

Note: Keep the record as opportunity offers, trying to cover full days until at least five or six business days and three or four nonworking days have been included. It is not necessary to stroke the record with absolute

accuracy or in public. Merely keep a mental record for short periods of a half hour or an hour and record it as opportunity permits. This is a quality check, not an exact quantity check, so missing a few won't matter.

When on-the-job necessary contacts are ten to fifteen times greater than those in the other two columns combined, it is a signal to think things over.

If the number of necessary home and outside contacts when compared to those in the other columns is more than one-fifth, a checkup is necessary.

CHAPTER XIII

DISCUSSION CONTROL AND GUIDANCE

FUNDAMENTAL RULES FOR DISCUSSION CONTROL AND GUIDANCE

All through previous chapters of this book there have been references to controlling and shaping conference discussion. Much of our comment has centered about the conference discussion processes and the handling accorded them. We have set up guiding rules for the leader that deal with the handling of the conference on a step-by-step basis. It has been apparent that there are discussions within a discussion for, in order to achieve the over-all objective of the discussion of a particular subject, the group proceeds from minor objective to minor objective, handling each of them as a separate discussion. As has been pointed out, some of these minor objectives require a full five-step discussion process which is not necessary in other cases. This does not affect the necessity for an over-all Step II, III, and IV at the conclusion of the consideration of the individual discussions of the minor objectives. In fact only through their use is the over-all conference discussion for the subject achieved.

Much stress has been placed upon the necessity for the leader always knowing just what step the conference is in, as it is his duty to control and guide the discussion so that it does not go astray but makes orderly progress to the summation of the conclusion. He must constantly evaluate each situation, changing the attack as required to meet group needs through the proper selection and use of the three discussion processes.

Each individual contribution by members of the group must be sized up and classified by the leader as it is made so that he will know its relation to the subject under discussion. These classifications are made according to whether it has

1. Direct bearing on the topic under discussion.
2. Close relation to the topic under discussion.
3. Slight relation to the topic under discussion.

4. No relation to the topic under discussion but is of a general nature.

The same four general rules for classification of individual conferee contributions can be used to determine just where the discussion is at any time with respect to its objective or conclusion. With a little experience, an alert leader will have no difficulty in following the progression of a discussion through the five steps of the conference process and will be able to know at any time just where the discussion is in relation to the conclusion desired.

By determining just what relation the particular statement contributed to the discussion by an individual may have, the leader can tell whether it is pertinent and should be admitted. He also can select those items to be expanded through discussion to further the drawing-out process as well as the ones for discussion in order to push on toward the desired conclusion. He obtains leads for his follow-up questions and ideas that can be used to shape the discussion trend. Through the application of these four measures of the value of contributions to the discussion the leader is able to keep ahead of the discussion trend and perceive its significance sufficiently in advance to give the necessary guidance. A leader must constantly be forming questions in his mind which he can use to shape the discussion. Many of these questions he will never use at all but constant sizing up of the situation keeps him alert and makes him its master.

A discussion has a very definite path or flow as it progresses to a conclusion. It may start in a slightly related or general zone, so far as the discussion objective is concerned; as it progresses the individual contributions and comments and the leader's guidance cause it to vary from one to another of the classifications listed above, with the swings from one to another narrowing down within the closely related and directly related zones as the discussion is crystallized and a conclusion reached. The use of flow diagrams to chart the path of a discussion is covered later in this section.

An important part of leader training conferences consists of checking the effectiveness of the discussion conducted by the individual trainees during the practice sessions. Many schemes have been advanced for rating individual conference leaders. The great majority of them have attempted to rate the leader

himself rather than to check the effectiveness or quality of the conference discussion conducted by him. The evaluation of personal characteristics and traits of individual leaders is not only difficult but often inconclusive, for many leaders will be able to conduct excellent, effective discussions even though they do not have all the accepted characteristics of a leader to a marked degree. This relates to that intangible something that we call personality; it is of secondary importance whether the leader manifests all the desirable traits and characteristics normally ascribed to good leadership so long as a satisfactory discussion is held. Consequently, we shall rate the discussion conducted by the leader rather than the leader himself.

THREE CHECKS ON THE EFFECTIVENESS OF A CONFERENCE DISCUSSION

There are three parts to making a worth-while check of a conference discussion that, at the same time, provide material for constructive criticism of the practice conference leading sessions. The first is the use of Form LT-1, Discussion Flow Diagram, to make a flow diagram such as the one mentioned above and illustrated in Figs. 20, 21, and 22. The second is to make a check of the quality of discussion using Form LT-2, Fig. 23, while the third consists of making observations of a general over-all nature concerning the effectiveness of the discussion.

The flow diagram, together with its correlated notes, gives a definite history of the trends taken by the discussion. The quality check (Form LT-2) discloses the effectiveness of the leader's use of conference leadership technique as well as the over-all nature of the conference discussion, *i.e.*, whether it was Purely Developmental, Shaped Developmental, or Informational. This can be checked against the leader's assignment and his original plans for the discussion. Each of these two observations is made by a separate observer who is a member of the group but not sitting in on the practice session being checked. Since the two observers making the flow diagram and the quality check are concerned with watching details, a third observer is required to check the over-all group reactions to the conference and its general quality. This third man may be either the leader of the training conference or one of the group members not participating

in the practice session being checked. Since leader training conferences are most effective when a group of twelve is used, this leaves eight or nine trainees in the practice session group.

DISCUSSION FLOW DIAGRAMS AS PLOTTED BY AN OBSERVER

Let us consider each of these three items and see how it is used. The flow diagram is of great value in the discussion that follows a practice session since it can be transferred to the board and, with the notes accompanying it, forms a reasonably accurate history of the discussion trend. As is shown in Fig. 20, a chart such as that illustrated in Form LT-1 is used with the vertical axis sectionalized so as to represent the four ways of classifying material contributed to a discussion. The horizontal axis represents time in a general way. As is shown in Fig. 20, the area next the horizontal axis represents material having a direct bearing on the topic under discussion; the second area from the horizontal axis, that having close relationship; the third, slight relationship; and the fourth, no relation to the topic under discussion. By evaluating each significant contribution made by the leader and the group members in terms of its relation to the topic under discussion and plotting its approximate position in one of the four areas defining that relation, a flow diagram can be obtained. If pertinent points on the curve are numbered progressively, brief concise notes can be made relative to the trend of the discussion. These notes should include brief key phrases or words actually used by the group members or leader since they will bring the topics back to mind during the discussion following the practice session. No attempt should be made to locate the points with any extreme accuracy since the graph is of a general nature and is intended merely as an indication of the trends in the discussion. Whether a point lies just over the line in slightly related material or just under it in closely related material is of no great importance as long as the general flow is shown. In fact, until experience with the plotting of flow diagrams has been obtained, sometimes the whole diagram will be shifted or displaced in a vertical direction but will still show the necessary flow characteristics. In deciding whether a particular statement or question is directly, closely, or slightly related to the topic under discussion, we must view it from the standpoint of what it does or could do to the discussion. Thus a remark, state-

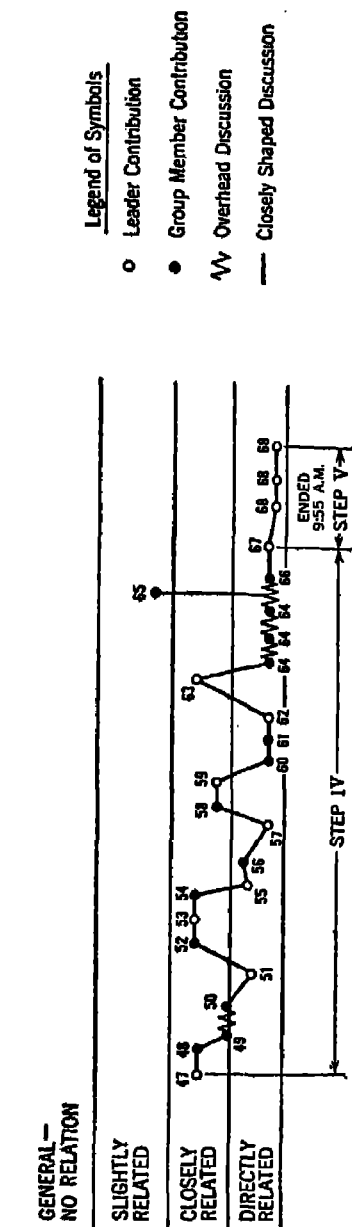
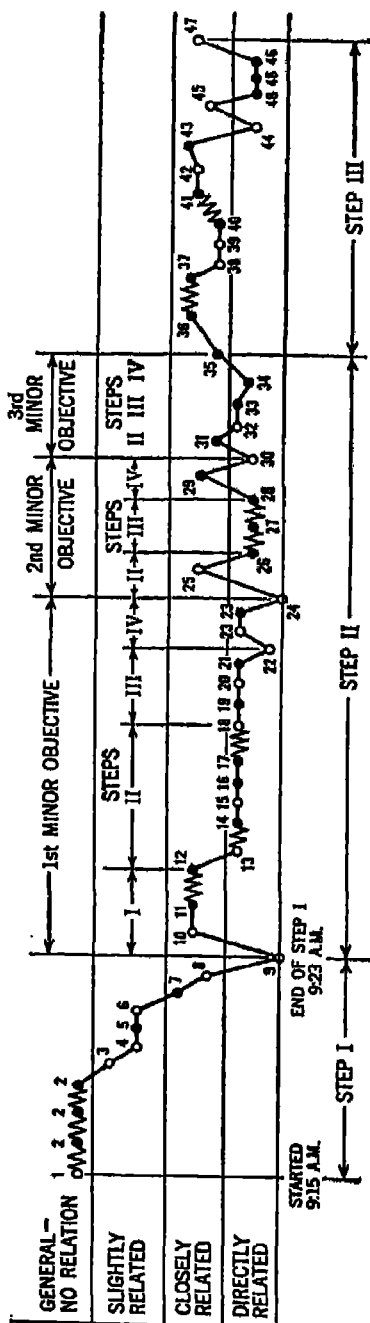


FIG. 20.—Flow diagram for an actual discussion.

Brief topical outline of subject provided to clarify flow diagram notation.
Major objective: What are some of the things within an individual which determine the nature of his reactions?
Method of handling: Purely developmental.

Minor Objectives: 1. Background or antecedents

2. Environment.
(Today's experiences become tomorrow's antecedents)

3. Heredity.

Remarks and Examples

Family, home life, schooling, etc.
 Standing of family in community.
 Family financial circumstances.
 Happiness or discord in family.
 Social views of family.
 Church, reading, views of friends.
 Pride, bravery, disease, physique.

Descriptive Notes

1. "What would you do now if you were Hitler?" (Nov., 1944).
2. Overhead discussion, Tom, John, and Bill.
3. Wouldn't we seek protection?
4. Would we all react the same way if we were in Hitler's boots?
5. Harry, "I'd hole up in Berchtesgarden." Glenn, "I'd escape."
6. Why do we each have different reactions?
7. Tom, "Our interests and desires are different."
8. That's a good point. Let's look at it.
9. Leader puts on board: What are some of the things that cause our reactions?
10. To Tom for ideas—Our experiences.
11. To Jack for ideas—Social experiences.
12. To John for ideas—Business success or failure.
13. Leader got "Experience" written on board.
14. John, "Family background counts."
15. How does it tie in?
16. Tom—Political life.
17. Jim—Childhood life.
18. Bill—Ambition.
19. General Overhead.
20. Leader gives illustrative experiences on Power Company operator throwing switches. Gets "ambition" on board.
21. Bob comments on accident.
22. Leader got "background" on board.
23. Leader reconciling group ideas on background.
24. Acceptance on "background" obtained.
25. Any other things which affect our reactions.
26. Jim—Environment.
27. Tom—Political situation.
28. John—Health and age.
29. Bob—Customs.
30. Leader—Is that environment?

All descriptive notes for diagram have not been included. Enough have been supplied to indicate type and use of notes to recall what happened during the discussion.

ment, or question that falls in the slightly related or general zone may not be followed by one of the same nature, since the leader or one of the group may deliberately bring the discussion back to closely related or even directly related material. The flow diagram will, of course, reflect when the discussion is of an overhead and when of a closely shaped nature, as the nature of the discussion itself will vary during the conference discussion.

The illustrative graph of a discussion shown in Fig. 20 is for a Purely Developmental discussion. As can be seen from it, the discussions of each of the minor objectives are complete units within the structure of the over-all discussion. Occasionally the group will attempt to overlap discussions of minor objectives and it will be necessary for the leader to keep them on the beam with respect to the item being discussed until it has been satisfactorily concluded. In order to show what parts of the discussion are of an overhead nature, in contrast to those shaped by the leader, a wavy line is used.

It takes practice to become proficient in making flow diagrams since it is only necessary to record the items which really affect the trend of the discussion. The time axis is greatly distorted and no attempt should be made to correlate it with the actual time consumed. As an illustration, the discussion may center around an item in the slightly related field without changing much and the same number can be ascribed to several points on the graph with only one explanatory note. Likewise, every little statement and comment does not have to be reflected in the diagram since it is intended to be only qualitative and not quantitative.

Figure 21 shows another way of portraying a discussion through the use of duplicate informational groupings above and below a center line. This permits the listing of "for and against" items by showing the discussion favorable to the subject above the line and that against it, below the line. This enables us to show swings from one position to another. In the sample graph shown, a simple five-step discussion has been assumed. This graph is particularly useful in charting Type 5 meetings, *i.e.*, conferences concerned with reconciling differences.

Discussion diagrams as a rule concern themselves mostly with the first four steps in the conference process, since the fifth step is purely a function of the leader. When they are made for

Shaped Developmental and Informational discussions, the nature of the discussion is quite apparent from the diagram and the associated notes. In all cases it will be found that Step I, Approach, is of great importance; unless it is well done, there will be frequent occasions when the group will throw the discussion

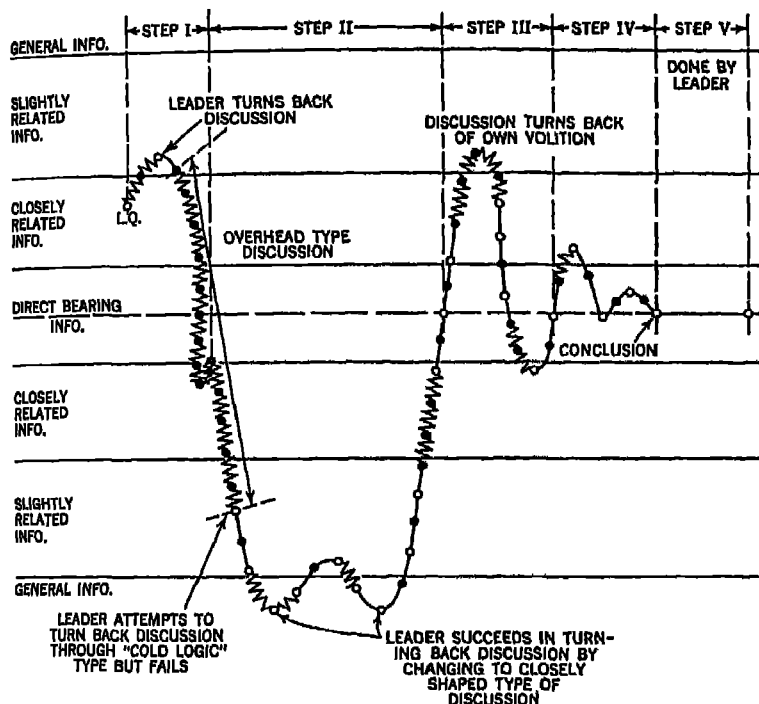


Fig. 21.—"Course" taken by a discussion—purely developmental.

back into Step I in attempting to clarify just what is being discussed. Flow diagrams will generally prove beyond a doubt the need for a Step I to define clearly the problem under discussion, clarify the meaning of any descriptive words such as adjectives or adverbs used in setting the objective of the discussion, and permit sufficient group discussion to get crystallization of what is under discussion and acceptance as to its scope. Even in the extreme Informational conference process where the subject to be discussed is written on the board at the start of Step I, sufficient definition, clarification, and acceptance should be

obtained through closely shaped group discussion. A flow diagram shows that a good Step I almost always will show clearly each of the five steps within the Step I itself. The discussion may vary between rather wide extremes, such as directly and slightly related material, during Step IV since it is one of summation.

Form LT-1

**CONFERENCE LEADERSHIP TRAINING
FLOW DIAGRAM OF TREND OF DISCUSSION**

Leader _____ Recorder _____ Date _____
Subject of Discussion _____

	G
	SR
+	CR
	DR
→	DR
	CR
-	SR
	G

Remarks:

1.
2.
3.
4.
5.

FIG. 22.

Flow diagrams furnish a most effective and interesting means of obtaining a good discussion following a practice leading session since they give some factual basis for it and help remove the feeling of individual criticism that sometimes results from depending upon the comments of the members of the group. Care must be taken to make sure that the diagram is made purely as a

quality diagram with no attempt to provide engineering accuracy or detail, since it is based on judgment alone and is at best only a spot check.

The graph with its associated notes is only a training aid and is seldom if ever used in actual conferences for the leader should always be free to keep abreast of discussion trends. Through its use in practice sessions, however, he is able to form an appreciation of the factors involved in discussion trends and how to use them. He should make every effort to check the various factors such as the completion of the steps in the over-all conference process used, the steps used in considering each of the minor objectives, the general impression gained with respect to the effectiveness of the handling, and any particular illustrations of good or poor practice.

THE CHECK OF QUALITY OF DISCUSSION BY AN OBSERVER

The Check of Quality of Discussion (Form LT-2) is designed to rate and evaluate the effectiveness of the conference discussion conducted by a leader rather than attempt to rate the leader himself. As mentioned earlier in this chapter, many attempts have been made in the past to set up forms for rating conference leaders. The evaluation of the personal characteristics and traits of individual leaders is inconclusive since the basis for the rating must stem from the handling of the discussion. It is, therefore, much more effective to rate the quality of the discussion conducted, as the object of conference leadership is to obtain a satisfactory discussion. This Form LT-2 Check of Quality of Discussion (Leader's Action), Fig. 23, has been designed to reflect the leader's use of the various devices available to him and the character of the group discussion. Everything on the form should be interpreted in the light of the leader's action and what he does, not from the standpoint of the group action, because the form is designed to check the quality of the discussion conducted by a leader.

The form deals with three basic things: the use of questions by the leader, the character of the discussion, and the type and amount of overhead discussion indulged in by the group. In addition, a scale for showing the approximate nature of the general over-all discussion is provided.

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Form LT-2

CONFERENCE LEADERSHIP TRAINING CHECK OF QUALITY OF DISCUSSION - LEADER'S ACTION

Leader: _____ Recorder: _____ Date _____
Subject of Discussion: _____

QUESTIONS BY LEADER

BASIC TYPES				HOW USED		
DIRECTED (AT INDIV.)	OVERHEAD (AT GROUP)	RELATED (THRU LEADER TO DIFF. MAN)	REVERSE (BACK TO SAME MAN)	LEAD-OFF (START DISC.)	FOLLOW-UP (ADV. DISC.)	PROVOCATIVE

DISCUSSION

CLOSE SHAPING BY LEADER	INFORMATION CONTRIBUTED			ILLUSTRATIVE EXPERIENCES	
	DIRECT BY LEADER	LEADER IN ANSWER TO QUESTIONS FROM GROUP	BY AUTHORITY OF GROUP	BY LEADER	BY GROUP

OVERHEAD DISCUSSIONS

DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.
1			2			3			4		
5			6			7			8		
9			10			11			12		
13			14			15			16		
17			18			19			20		
21			22			23			24		
25			26			27			28		
29			30			31			32		
33			34			35			36		

GENERAL OVERALL NATURE OF DISCUSSION

INF. _____ 50 _____ P.O.
DRAW A VERTICAL LINE AT POINT WHICH APPROXIMATES THE OVERALL NATURE OF THE DISCUSSION.

FIG. 23.

DETERMINATION OF THE LEADER'S USE OF QUESTIONS

Questions are the main operating device of the conference leader; no conference leader can be successful without a thorough knowledge of them and how and when to use them. Through the proper use of questions the leader can wield an amazing power over our involuntary reactions. In earlier chapters, we have described the four basic types of questions and their use. The section of Form LT-2 headed by the phrase Questions by Leader is divided into two general sections that refer to the basic types of questions and to their use. In checking the quality of a discussion, the observer should tabulate by stroking each of the questions used by the leader under one of the four basic types shown on the form. These basic types are the same as those discussed and defined in Chap. IX, Questions and Their Use in Conference Leading. Thus, in the column headed Directed all questions directed at individuals by the leader are shown, while overhead questions directed at the group without the leader's designating a particular individual to reply are shown in the Overhead column. Questions which an individual in the group directs to the leader and which he redirects to a different member of the group should, of course, be shown as Relayed. The fourth basic type of question in which the leader directs a question asked him by one of the group members back to that group member should be stroked in the Reverse column.

It must be borne in mind that when we have classified a question by its basic type, we have merely defined it in terms of its operation. In order to completely describe a question, it should also be scored under one of the three columns showing how it was used in the progress of the discussion itself. Thus a directed or overhead type of basic question could also be a lead-off, follow-up, or provocative question depending upon its phrasing and use by the leader. The relayed and reverse basic types of questions are seldom, if ever, used as lead-off questions since they are originated by group members, not the leader. They may, however, be of a follow-up or provocative nature. As will be recalled, lead-off questions are used to start a discussion of a major or minor objective and appear most of the time at the start of Steps I, II, III, and sometimes IV. Follow-up questions are those designed to move the discussion on toward its conclusion rather than draw

out or provoke further discussion of a particular item or minor objective. Thus follow-up questions appear when the leader is desirous of moving the discussion on to the consideration of another point or of achieving acceptance or crystallization. Provocative questions, as the name indicates, provoke more discussion of the same point or minor objective and are designed for drawing out, not advancing the discussion. It is very important that the distinction between follow-up and provocative questions as defined in Chap. IX be thoroughly understood.

We can see then, that as a general rule, questions would be tabulated or stroked both under one of the basic types and also with respect to how they are used.

ADEQUACY OF DISCUSSION CONTROL

Under the subdivisions of the general heading Discussion are stroked the conference items which picture how the discussion itself is handled. Thus the heading *Close Shaping by Leader* should be stroked when the leader actually steps in and closely shapes the discussion. For instance, if the discussion is progressing in a zone of slightly related information or the general zone, and the leader steps in and brings it back to directly related material as a result of direct statements or questions that indicate that the discussion is off the beam, he is using close shaping. If he directed the group back into a closely related or directly related zone of discussion by a series of questions and discussions by group members in which he did not sharply shape or point out the untoward trend of the discussion, it would not be close shaping. To put it graphically, close shaping occurs when the leader "drops the group down the elevator well" instead of subtly guiding them back step by step or urging them down a gently inclined ramp. One way of expressing it is to say that the conference leader uses an adjustable inclined ramp in handling a discussion. When he places it in a vertical or sharply inclined position in which the group cannot help tumbling down it in spite of themselves, there is no doubt that the leader is using close shaping. The only time that stroke marks appear in this column is when the leader accomplishes close shaping by stepping in and using direct questions or statements which force the discussion back on the beam.

The subheading *Information Contributed* is divided into three sections. That called *Direct by Leader* includes those instances

in which the leader voluntarily contributes Zone A information to the group on what might be termed a lecture or informational basis. This covers those instances in which the leader provides information that the group may not have or where he provides it himself even though some of the group members may have it (i.e., be in Zone A). There may be instances where this appears even though the over-all discussion might be Shaped Developmental in nature. It quite often appears in Step I of the over-all conference process as it applies to a major objective since Step I defines and sets up the ground rules for the subject under discussion.

Information Contributed by the leader as Answers to Questions from Group applies to instances in which the leader gives out the actual information in answer to a group member's question instead of relaying it or reversing it and thus having the group provide the information.

The column By Authority in the Group covers cases in which information is contributed by an authority in the group such as may be the case in Informational-type conferences. As has been pointed out previously, this is a characteristic of everyday business conferences in which the various group members are authorities or specialists in their own particular fields.

In stroking items under all three subheadings of Information Contributed, it must be remembered that the leader or the authority actually has to contribute pertinent information of Zone A nature. Until experience has been gained in making quality checks of discussions, there is a tendency to include clarifying and adjustive statements and contributions by the leader under these heads. This should not be done since clarification or adjustment is not contributing information. Strokes appear in the Authority in the Group column only when a group member actually replaces the leader momentarily as the authority supplying Zone A information in an Informational Discussion manner.

ILLUSTRATIVE EXPERIENCES AS RELATED TO QUALITY OF DISCUSSION

Illustrative experiences add a great deal to the color and interest of any conference. They are essential to the success of a conference and the leader must gain facility in their use and the stimulation of group members to contribute them. The

ability to make the proper use of illustrative experiences in conferences must be a part of any check of the quality of discussion. The subheading *Illustrative Experiences* under the main section *Discussion* is divided into two parts. By *Leader* is provided for stroking the instances in which the leader contributes illustrative experiences and the column *By Group* for recording those contributed by group members. To warrant recording as an illustrative experience, the item must be a recitation of an actual or hypothetical case, not merely a reference to such a case.

OVERHEAD DISCUSSIONS WITHIN THE CONFERENCE GROUP

Spontaneous overhead discussion by group members, short-circuiting the leader, is a natural part of a good conference discussion. It not only is direct evidence of group interest but is an indication of group participation as well as the type of discussion process used. As a general rule, there will be more and longer instances of overhead discussion in the *Purely Developmental* discussion than in the *Shaped Developmental*. Good leadership calls for the permission of limited amounts of overhead discussion even in the *Informational* conference process. In this case, it will as a general rule appear in the latter part of *Step II* and in *Step III*. In fact, if the group is interested and feels free to participate, it will be difficult as well as unwise to prevent occasional excursions into overhead discussion. As has been pointed out, overhead discussions are those which take place between group members, short-circuiting the leader, and may appear in any of the three conference discussion processes.

Form LT-2 provides for tabulating overhead discussions. Each separate overhead discussion is scored in one of the blocks under the heading *Number of Individual Contributions* and a stroke is included for each time a group member participates. Thus, an overhead discussion occurs if one group member makes a statement that is answered by another even though it was originally intended for the leader and group members to continue the discussion. Every time a contribution is made by a group member, regardless of whether he has participated previously, it should be stroked. The overhead discussion ends when the leader steps in and stops it or when it terminates of its own volition and the group moves on to the consideration of some other item. The number of individual contributions to a single

overhead discussion may be as few as two or three or, upon occasion, may run to as many as forty or fifty. In Purely Developmental discussions when spontaneous, the number of individual contributions to any single overhead discussion may be high. Each of the overhead discussions should be scored opposite a separate discussion number. Thus the number of overhead discussions in a particular conference is indicated by the final number used in the column Discussion Number.

The third column under the section Overhead Discussions, Duplicate Discussions, provides for recording instances where two overhead discussions are going on in the group at the same time. This occurs when the group breaks up into two or more separate discussions. It is scored beside the particular overhead discussion where it took place. Occasional instances are not unusual nor particularly alarming. However, if duplicate discussions occur more than two or three times during the discussion of a subject it indicates poor handling by the leader. When double discussions are protracted, the leader's job is to step in and shape one of them into the other discussion or, if that is not possible, to terminate both by directing the discussion toward himself.

USE OF A QUALITY CHECK TO DETERMINE OVER-ALL NATURE OF A DISCUSSION

When a Check of Quality of Discussion, Form LT-2, has been completed, the over-all nature of the discussion can be determined by inspection, in addition to obtaining checks as to how the discussion was handled by the leader. It should be remembered, however, that the Check of Quality of Discussion does not give the whole story, as it must be combined with the Discussion Flow Diagram, Form LT-1, and the general observations on the discussion in order to obtain a complete picture.

The over-all nature of the discussion is evident from the relative proportion of each of the following as recorded on Form LT-2:

1. The basic type of questions which predominate and how they were used.
2. The number of instances in which close shaping was used by the leader and where Zone A information was contributed by the leader or authority in the group.

3. The number and extent of the overhead discussions.
4. The part that illustrative experiences played in the discussion.

In a Purely Developmental discussion, we would expect that overhead, relayed, and reverse questions would far outweigh the directed questions and that they would be used in a provocative manner more often than as follow-up. The Shaped Developmental would be reflected in an increase in directed questions and in a greater use of follow-up questions to advance the discussion. Similarly, an Informational discussion would reflect a much greater use of directed questions than in the other two cases as well as a pronounced use of follow-up. It must be borne in mind that all the basic types of questions and uses can, and usually will, appear regardless of whether the over-all discussion is Purely Developmental, Shaped Developmental, or Informational. As has been pointed out, the treatment of individual minor objectives will vary depending upon requirements, for we must not forget that any discussion is composed of discussions within the over-all discussion. Thus there will be times in a Purely Developmental discussion when individual small items in Step I may be handled on an informational basis or when minor objectives will call for closely shaped handling. Thus the over-all treatment of the discussion does not exclude the appearances of any of the individual types of questions but is determined from the relative quantities of them which appear. In considering the use of questions, we must not forget that they must be evaluated in the light of what has been tabulated on Form LT-2 under Discussions and Overhead Discussions.

When a relatively high proportion of the discussion falls under the Close Shaping by Leader and the Information Contributed classifications, it is obvious that the discussion must have had a decidedly Informational tinge. Whether it falls somewhere between Shaped Developmental and Informational or in the Purely Developmental classification will depend upon the distribution of the discussion between such items as are characteristic of the individual discussion types.

It is only natural to expect a greater use of illustrative experiences in the Shaped Developmental and Purely Developmental discussions than in the Informational. They will tend to appear from time to time in the Informational discussion since contribu-

tions of information by the leader or by an authority in the group will occasionally be in the form of the recitation of previous experiences that resulted in the development of the information contributed.

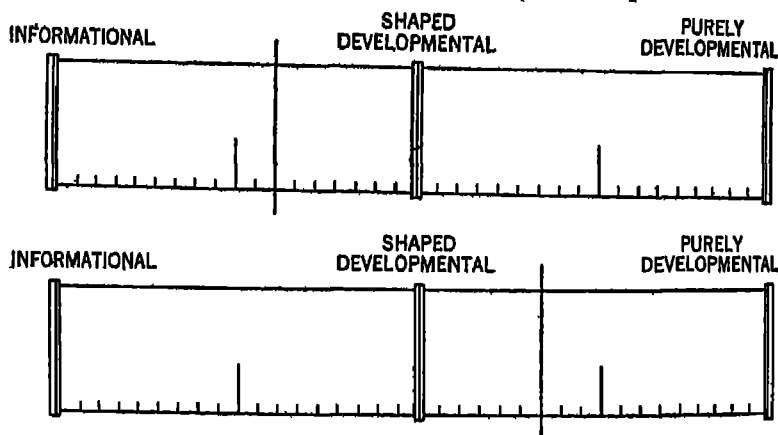
The number and length of overhead discussions is a direct index to the type of discussion and also to the group's feeling of a freedom to participate in the discussion. Whenever close shaping is present or an informational method is used, the number of contributions to the overhead discussion will tend to be limited. In Shaped Developmental, they appear in greater number and tend to be of longer duration unless the leader limits them, while in the Purely Developmental there is a tendency for more and longer overhead discussions to take place. Unless the leader has shown poor control and a lack of ability to sense the significance of contributions to the discussion, there will be a greater tendency toward the development of duplicate overhead discussions in the Purely Developmental discussion than in the Shaped Developmental, with very few instances of it in the Informational. Unless overhead discussions develop duplicate discussions in excess of two or three per major objective, they merely indicate the group's interest and desire to participate. When they develop too frequently, it may indicate loose handling by the leader or a lack of understanding of the result of Step I. In extreme cases where the group gets out of control or horseplay develops, it is immediately evident; it is usually preceded by an unnaturally marked tendency of the group to participate in duplicate overhead discussions. The significance of the duplicate discussions should be caught by the third observer watching the group reactions.

Ability to evaluate the record of a discussion on Form LT-2 comes only with experience; however, after one has made the record a few times it is surprising how checks of the quality of the same discussion made by different individuals will correlate. It is important to remember that a check of quality of discussion is, as the name implies, an attempt to determine merely the quality, not the quantity, and that an occasional error in stroking an item or omitting one altogether will not have any marked effect. This is at best a spot check for the rapid progress of a discussion does not give the observer time to make extensive deductions in his own mind before each stroke. In fact, little is

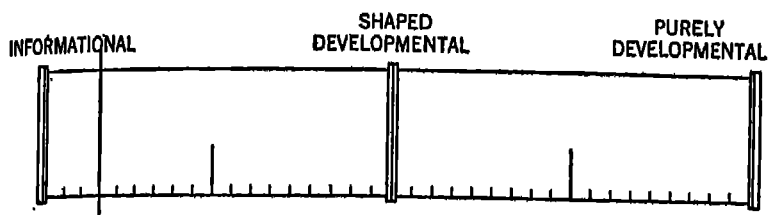
gained through attempting to evaluate each contribution in too much detail, because as soon as the proper bench marks have been set up in a person's mind as to what each of the form's classifications means, an involuntary, instinctive stroking based upon impressions is correct in the great majority of instances.

RATING CHART FOR RECORDING OVER-ALL NATURE OF A DISCUSSION

The chart shown at the bottom of Form LT-2 is designed and scaled so as to permit the observer to draw a vertical line at the point which approximates the over-all nature of the discussion. Since it is the exception rather than the rule that an over-all discussion made up of discussions of a series of minor objectives will be consistently Purely Developmental, Shaped Developmental or Informational in its entirety, most discussions will fall somewhere between Informational and Shaped Developmental, or between Shaped Developmental and Purely Developmental. Thus a discussion could be Shaped Developmental and have a sufficient amount of Informational in it to cause it to fall somewhere between Shaped Developmental and the halfway point between it and Informational, or between Shaped Developmental and halfway between it and Purely Developmental.



Likewise either an Informational or a Purely Developmental discussion might have sufficient closely shaped handling to cause it to be stroked between those points and the mid-point between them and Shaped Developmental.



The particular point at which a vertical line is drawn on the scale is determined by the observer's over-all evaluation of the information on Form LT-2, Check of Quality of Discussion. Sample Forms LT-2, Check of Quality of Discussion, illustrating the relative distribution of the various items for each of the three specific discussion processes, have been included at the end of this chapter to clarify the use of the form.

OBSERVATIONS OF THE GENERAL NATURE OF A DISCUSSION

As mentioned at the start of this chapter, the third part of a complete check of a conference discussion consists of making observations of a general over-all nature concerning the effectiveness of the discussion. This should be done by a third observer since the observers making the Flow Diagram and Check of Quality of Discussion are too busy watching the details of the discussion to sit back and sense the general reactions of the group. This is often done by the leader of the leader training conference who will, of course, handle the discussion following each of the practice leading sessions conducted by the trainees. In fact, the best plan is for the leader of the leader training conference to make flow diagrams of the first one or two practice leading sessions himself and base his comments and discussions upon them. He can then make the first one or two quality check sheets. After he has broken in the group as to the use of the flow diagram and the check of quality of discussion sheets, he can assign them to nonparticipating conference members with some degree of success and from then on handle the general over-all check of the discussion himself. He must be sure to check the trainees making the flow diagram and the quality check sheets from time to time so as to be sure that they are making them correctly. Since it is good practice in leader training conferences to devote a minimum of three or four days to a conference discussion of the background and methods used in conference leading and then follow

it up with two rounds of practice sessions, all the trainees will have ample opportunity to perfect themselves in the use of the Flow Diagram and the Check of Quality of Discussion. After the first few attempts, it will be evident that the flow diagrams and the quality checks made by separate observers for the same discussion check remarkably well. In this type of check the number of strokes for a particular item of the Check of Quality of Discussion should not vary more than 20 per cent after experience has been gained with them. Since it is only a quality spot check at best, it would be foolish as well as a waste of time to attempt to get exactly the same scorings for two observers.

DISCUSSION OBSERVATIONS AS A LEADER TRAINING TOOL

In addition to the advantages gained from the use of the Flow Diagram, the Check of Quality of Discussion, and the general observations in conducting the constructive evaluation of practice sessions, the making of Flow Diagrams and Quality Checks of Discussions also keeps busy those members of a conference leadership training group who do not participate in a practice session. It focuses their attention and thoughts on what is going on, preventing their minds from wandering while they are getting an over-all view of conference procedure that is difficult to obtain when they are actually participating in the practice session. Most important of all, it trains them in perceiving the significance of what the conferee contributes to a discussion and in sizing up a situation quickly. It aids in the formation of judgment and in sensing as well as guiding conference trends.

The Flow Diagram and the Check of Quality of Discussion are designed primarily for use in leader training conference practice sessions. They are not intended for the use of a leader who is conducting a conference in an attempt to check on the conference he is conducting. It should be obvious that the leader is too busy conducting a conference to be able to make either a Flow Diagram or a Check of Quality of Discussion. The leader of the leader training conference should make follow-up checks of leaders he has trained when they start conducting conferences on their own. If he meets the conference group prior to the start of the session so that they will know him and not be distracted by his sitting in the background, his presence should not detract from the effectiveness of the conference. At

the end of the day's session which he observes, he should discuss it with the leader and make such helpful, constructive suggestions as are necessary. Flow diagrams and quality check sheets give a sound basis for such comments and assist in making a correct analysis. It is not possible to make both a flow diagram and a quality check sheet at the same time, nor is it worth while to attempt to make them for all the items discussed. It should be sufficient to make a flow diagram on one or two major objectives or subjects and a quality check on a couple of others; these, coupled with notes made as a result of general observations, will provide plenty of sound worth-while material for comment.

HINTS AND AIDS IN CONFERENCE CONTROL

The conference leader will find that a large easel with fifty or sixty sheets of paper, at least four by three feet in size, clamped to it so that they may be written on with crayon and then turned over the top of the easel as used, is a most effective tool in guiding the discussion. It has the advantage of retaining the record so that reference can be made to it. As contributions are made by group members, the conference leader should write them on the board for the group's consideration. This very act of writing focuses the group attention on the contributions and leads to their consideration. The leader can permit the discussion of each or not as he desires. Also he can neglect to write up certain ones that are of a general nature and by selection he can do much to control the trend of the conference. Even though the conference is of a Developmental type, such a record is of value and interest in addition to aiding the discussion. This technique is effective regardless of which of the three discussion processes is used.

When all the group contributions that the leader wishes to record have been listed, he then selects as the one he wishes to pursue that which will further the discussion objective and asks his follow-up question about it. This device is of much value in shaping and controlling the discussion. It can even be used as a means of graphing the progress of a discussion by simply listing the responses or contributions and progressively doing the same thing for each of the follow-up questions until the discussion reaches its conclusion. The series of responses and follow-up questions can then be separated into the over-all five steps and

subdivided into the discussion steps used for each minor objective. Notes are, of course, taken to cover the salient features of the discussion.

One of the simple and effective means of controlling discussion consists of the leader merely rising from his chair at the head of the table, proceeding to the board, picking up the crayon, and drawing a line. When the leader is seated, the group has the feeling that the discussion can go on as they wish but when he rises, attention is focused on him and discussion tends to lag. He must keep calm and cool to be able to shape the discussion and guide it; he should form the practice of sitting in his chair during the normal flow of the discussion, for the group attention is not so likely to be focused on him as when he is standing or moving about.

Familiarity with the conference objectives and details gives the leader the key by which to shape the discussion. Unless he is thoroughly familiar with the material and background, he will have nothing by which to gauge the irrelevant and shape it out of the discussion. Conference planning, as discussed in a later section, has much to do with preparing the leader for effective discussion control.

The leader takes several factors into consideration in determining the distribution of the discussion between shaped and overhead. Time is often a factor in business conferences and the leader should limit the overhead discussion to that necessary for a natural flow. A small amount of it is always necessary if the feeling of domination by the leader is to be avoided.

Another factor is the extent and distribution of the zone knowledge of the group, including the leader's knowledge. As we have pointed out, a lack of Zone A knowledge on the part of the group makes it necessary either to interweave Zone A information in a Purely Developmental conference or to resort to a Shaped Developmental discussion in order to achieve it. In discussions of a Shaped or Informational nature, the Informational discussion approach is used to offset a lack of Zone A knowledge.

The relative importance of the particular item under discussion to other minor objectives, the major objective of the particular discussion, and the over-all objective is also a factor in determining the distribution between shaped and overhead discussion. It goes without saying that the type of handling indicated by

CONFERENCE LEADERSHIP TRAINING
CHECK OF QUALITY OF DISCUSSION - LEADER'S ACTION

Leader: John Doe Recorder: R. Smith Date 4-17-44

Subject of Discussion: _____

Note: Illustration of an Informational Discussion
(46 minutes duration)

QUESTIONS BY LEADER						
BASIC TYPES				HOW USED		
DIRECTED (AT INDIV.)	OVERHEAD (AT GROUP)	RELAYED (THRU LEADER TO DIFF. MAN)	REVERSE (BACK TO SAME MAN)	LEAD-OFF (START DISC.)	FOLLOW-UP (ADV. DISC.)	PROVOCATIVE

DISCUSSION					
CLOSE SHAPING BY LEADER	INFORMATION CONTRIBUTED			ILLUSTRATIVE EXPERIENCES	
	DIRECT BY LEADER	LEADER IN ANSWER TO QUESTIONS FROM GROUP	BY AUTHORITY IN GROUP	BY LEADER	BY GROUP

OVERHEAD DISCUSSIONS											
DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.
1			2			3			4		
5			6			7			8		
9			10			11			12		
13			14			15			16		
17			18			19			20		
21			22			23			24		
25			26			27			28		
29			30			31			32		
33			34			35			36		

GENERAL OVERALL NATURE OF DISCUSSION	
INF.	P.O.
DRAW A VERTICAL LINE AT POINT WHICH APPROXIMATELY THE OVERALL NATURE OF THE DISCUSSION.	

FIG. 24.

184 CONFERENCE LEADERSHIP IN BUSINESS AND INDUSTRY

CONFERENCE LEADERSHIP TRAINING
CHECK OF QUALITY OF DISCUSSION - LEADER'S ACTION

Leader: Jim Jones Recorder: J. Collins Date 4-18-44

Subject of Discussion: Illustration of Chapel Developmental Discussion
(35 Minute Duration)

QUESTIONS BY LEADER

BASIC TYPES				HOW USED		
DIRECTED (AT INDIV.)	OVERHEAD (AT GROUP)	RELAYED (THRU LEADER TO DIFF. MAN)	REVERSE (BACK TO SAME MAN)	LEAD-OFF (START DISC.)	FOLLOW-UP (ADV. DISC.)	PROVOCATIVE

DISCUSSION

CLOSE SHAPING BY LEADER	INFORMATION CONTRIBUTED			ILLUSTRATIVE EXPERIENCES	
	DIRECT BY LEADER	LEADER IN ANSWER TO QUESTIONS FROM GROUP	BY AUTHORITY IN GROUP	BY LEADER	BY GROUP

OVERHEAD DISCUSSIONS

DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.
1			2			3			4		
5			6			7			8		
9			10			11			12		
13			14			15			16		
17			18			19			20		
21			22			23			24		
25			26			27			28		
29			30			31			32		
33			34			35			36		

GENERAL OVERALL NATURE OF DISCUSSION

INF. 50 P.O.

DRAW A VERTICAL LINE AT POINT WHICH APPROXIMATES THE OVERALL NATURE OF THE DISCUSSION.

Fig. 25.

CONFERENCE LEADERSHIP TRAINING
CHECK OF QUALITY OF DISCUSSION - LEADER'S ACTION

Leader: Bill Davis Recorder: J. F. John Date 4-16-44

Subject of Discussion: _____

NOTE
Illustration of a Purley Developmental Discussion
1 hr. 42 minutes duration

QUESTIONS BY LEADER							
BASIC TYPES				HOW USED			
DIRECTED (AT INDIV.)	OVERHEAD (AT GROUP)	RELAYED (THRU LEADER TO DIFF. MAN)	REVERSED (BACK TO SAME MAN)	LEAD-OFF (START DISC.)	FOLLOW-UP (ADV. DISC.)	PROVOCATIVE	

DISCUSSION					
CLOSE SHUTTING BY LEADER	INFORMATION CONTRIBUTED			ILLUSTRATIVE EXPERIENCES	
	DIRECT BY LEADER	LEADER IN ANSWER TO QUESTIONS FROM GROUP	BY AUTHORITY IN GROUP	BY LEADER	BY GROUP

OVERHEAD DISCUSSIONS											
DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.	DISC. NO.	NO. INDIVIDUAL CONTRIBUTIONS	DUPL. DISC.
1			2			3			4		
5			6			7			8		
9			10			11			12		
13			14			15			16		
17			18			19			20		
21			22			23			24		
25			26			27			28		
29			30			31			32		
33			34			35			36		

GENERAL OVERALL NATURE OF DISCUSSION

INF.P.D.

DRAW A VERTICAL LINE AT POINT WHICH APPROXIMATES THE OVERALL NATURE OF THE DISCUSSION.

the particular major or minor objective as set up in our conference planning will be the result of the consideration of these factors as well as the treatment indicated by the purpose of the meeting.

Although all the discussion of questions and their use as covered in Chap. IX has a bearing on conference control, the directed question is one of the leader's most effective tools in controlling discussion trends. Some of its more important uses are

1. To bring back wanderers.
2. To determine discussion distribution.
3. To determine zone shift.

Where a leader does not have the opportunity to gain a knowledge of conference control through the medium of practice sessions in a leader training conference, much will be gained by making flow diagrams and quality checks of actual conferences in which he is a conferee. As brought out in Chap. XVI on suggested programs for the training of conference leaders, the leader can only consolidate his ideas on leading into an actual technique through actual firsthand experience.

COMPLETION QUIZ

Write in missing words

1. There are _____ within a discussion as the group proceeds from _____ objective to _____ objective to achieve the _____ objective.
2. The leader must constantly _____ each and every situation, changing the attack to meet group needs.
3. Each individual contribution made to the discussion is sized up by the leader and classified as to whether it has
 - a. _____ bearing on the discussion topic.
 - b. close _____ to the discussion topic.
 - c. _____ relation to the discussion topic.
 - d. _____ to the discussion topic.
4. By applying the four measures of the value of a contribution to the discussion listed in 3, the leader is able to _____ of the discussion trend.
5. A leader must _____ be forming _____ in his mind that he can use to shape the discussion.
6. A discussion has a definite path or _____ as it progresses to a _____.
7. It is better to rate the _____ conducted by a leader than the _____.
8. The three parts to making a worth-while check of a discussion are
 - a. the _____.
 - b. check of _____ of _____.
 - c. observations of a general _____.

9. The Flow Diagram together with its correlated notes gives a definite _____ of the _____ taken by the discussion.
10. The check of Quality of Discussion discloses the _____ of the leader's use of conference _____ and the over-all nature of the conference discussion.
11. A third observer is required to check the over-all _____ reactions to the _____ and its general quality.
12. The Flow Diagram and the Check of Quality of Discussion are designed primarily for use in leader training conference _____.
13. The leader of a leader training conference should make _____ checks of the leaders he trains.
14. The conference leader will find that a large _____ with fifty to sixty sheets of paper four by three feet clamped to it most _____.
15. When the leader is _____ the group has the feeling that the _____ can go on as they wish.
16. When the leader rises, attention is _____ on him and the discussion tends to _____.
17. The leader should make a practice of _____ in his _____ during the normal _____ of the discussion.
18. Familiarity with conference _____ and details gives the leader the key by which to _____ the discussion.
19. The directed question is an important tool in controlling discussion trends. Some of its uses are
 - a. to bring back _____.
 - b. to determine discussion _____.
 - c. to determine _____ shifts.
20. A knowledge of conference _____ is of vital importance to the conference leader.

Answers: 1. discussions, minor, minor, major. 2. evaluate. 3. a. direct, b. relation, c. slight, d. no relation. 4. keep ahead. 5. constantly, questions. 6. flow, conclusion. 7. discussion, leader. 8. a. flow diagram, b. quality, discussion, c. over-all nature. 9. history, trends. 10. effectiveness, leadership technique. 11. group, conference. 12. practice sessions. 13. follow-up. 14. ease, effective. 15. seated, discussion. 16. focused, lag. 17. sitting chair, flow. 18. objectives, shape. 19. a. wanderers, b. distribution, c. zone, control. 20.

CHAPTER XIV

CONFERENCE DISCUSSION PLANNING

THE NEED FOR CONFERENCE DISCUSSION PLANNING

Earlier in this book when we were considering the teaching-learning process, the General Conference Process, and the three specific conference processes, it was pointed out that the preparation of the conference outlines and material was most vital to the success of any conference. This preparation, however, must be done prior to the actual conference session and is not included as a part of the conference processes, which deal only with the actual conduct of the discussion itself. The preparation of the conference outline and background material, together with the plans of the discussion, is most intimately tied in with the discussion but must of necessity precede it. Since it is performed independently of the group discussion itself, it should not be included within the same process as the actual step-by-step conduct of the discussion.

In this chapter we shall be concerned with the preparation of the conference outlines, background material, and plans for conducting the discussion. Chapter XV, The Conference Setting, covers the other side of conference planning and relates to the necessary conference facilities, equipment, supplies, and personal needs of the conferees.

Conferences and conference leadership are in no way different from any other business or industrial activity with respect to the need for adequate advance planning. It is important in all types of conferences whether they be the formal business conference, the day-to-day business conference, or the purely training conference. The fortuitous nature of some day-to-day business conferences eliminates the possibility of detailed planning in advance and forces the conference leader to brief planning supplemented by adjustment of the actual discussion on an on-the-spot basis. The majority of the day-to-day business conferences can and should be given sufficient advance thought and planning

to ensure their efficient and satisfactory handling. The purely training conference and the formal business conference are much more susceptible to detailed advance planning. We shall, therefore, approach the problem of conference discussion planning and preparation by considering the type of planning suited to the formal business conference and the purely training conference and then adjust the procedure to meet the streamlined needs of the day-to-day business conference.

CONFERENCE MATERIAL AND OUTLINES AS A FUNCTION OF THE TYPE OF CONFERENCE

Before we can decide on just how we will go about preparing the background material and outlines necessary for conducting a conference, we must pause and take a general look at the type of material required to meet the needs of the possible types of conferences. In the purely training conference in which the group will come to certain more or less predetermined conclusions and procedures, the majority of the discussions will fall somewhere between Shaped Developmental and Informational. There will be a decidedly informational tinge to the whole picture even though only certain specified major or minor objectives are handled on a straight Informational conference discussion basis. In such conferences narrative, take-home material can be prepared in advance and distributed following the completion of the series of conferences that make up the training meeting. This is possible because the over-all net characteristic is informational in nature and the conclusions and procedures can, in general, be predetermined. In supervisory training conferences, for instance, certain conference subjects could be handled on this basis while a few might be of a developmental nature and only outlines could be provided since the actual conclusions and procedures would be determined by the group. Similarly, in formal business conferences making up a particular meeting which extends over a period of one or more days, some of the conference subjects would be of an informational nature for which narrative, take-home material could be supplied while others would be developmental and permit only the preparation of outlines covering the major objectives and their respective minor objectives since the final determination of the conclusion would rest with the group. Of course, in both the purely training and formal business con-

ferences, the conference subjects (major objectives) which would be handled on a Shaped Developmental or Purely Developmental basis could be expanded into narrative, take-home material following the conference discussions when the leader's outline could be converted into the conclusions and procedures developed by the group. As we shall find, the day-to-day business conference seldom warrants the preparation of narrative material, although take-home material covering the conclusions and procedures reached is usually needed. Advance preparation for day-to-day business conferences is usually restricted to the necessary leader's outlines, which will vary in viewpoint according to whether the individual subjects are Informational or Shaped Developmental. Thus we see that regardless of whether we prepare narrative, take-home material in advance of the conference session or following it, we must have an outline for the leader and a skeleton upon which we can hang the flesh in the form of narrative material if we so desire.

THE TOPICAL OUTLINE AS THE KEY TO CONFERENCE MATERIAL

There is a natural and simple procedure that lends itself to the preparation of any written text material of a narrative form. Basically it applies as well to writing a composition, such as we all wrote so laboriously in grammar and high school, as to the framing of a letter. Many of us use it in our day-to-day work and all of us will, no doubt, recall it quite vividly. It has masqueraded under many names, some simple and some complex, but probably the most generally used designation of the first step in the preparation of written material has been "the topical outline." It is both natural and wise to prepare a topical outline before we plunge into writing a detailed narrative on any subject.

When we have determined upon a subject that we wish to expand, we first take the key idea and then list in brief topical form the major divisions or parts of it. We can then readily break these major divisions down into their minor subdivisions. In making the topical outline we use brief, short, descriptive sentences listing the pertinent ideas without attempting to amplify them. We then inspect the major divisions of the subject one by one to see if they are logically a part of the subject and whether we have all of them, as well as to check the correctness of their arrangement and sequence. The same operation must be performed with the minor subdivisions of each major

division. The preparation of a flow diagram such as follows many of the chapters in this book rationalizes the outline into a smooth-flowing sequence. When we have completed such an outline and have made sure of both its adequacy and sequence, we can then expand it into a written narrative which gives full, complete, detailed treatment of each of the major subjects through amplification of the minor subdivisions. This is similar to the preparation of any book. If you will check the table of contents at the front of this book, you will note that the main idea is expressed in the title, Conference Leadership in Business and Industry, and the chapter headings form the major divisions of the subject. The section headings subordinate to each of the chapters form the minor subdivisions. If these were arranged in order and indented in accordance with their relative standing as major and minor subdivisions, we would, of course, have the topical outline for the book. By amplifying this topical outline we complete the detailed narrative treatment of each of the minor subdivisions one by one, thus completing each of the major subdivisions or chapters until we have the complete narrative or book.

The preparation of conference material does not differ fundamentally because the first step consists of breaking the meeting subject or subjects down into the specific conference discussion subjects or major objectives that will make up the over-all meeting and then dividing each one into the minor objectives which lead in logical sequence to it as a conclusion. As we have already mentioned in the case of Informational conferences or Shaped Developmental conferences on the informational side, both the topical outline and the complete narrative material of a descriptive nature can be prepared prior to the conference. In the case of Shaped Developmental on the purely developmental side or Purely Developmental conference subjects, only the topical outline can be prepared in advance because the actual conclusions and procedures cannot be determined upon until after the group has met. The principle of the topical outline that forms our basic analysis is shown in Fig. 27.

RELATION BETWEEN THE TOPICAL OUTLINE AND THE LEADER'S OUTLINE

Let us examine the topical outline and see whether or not it will meet the needs of the conference leader in handling his

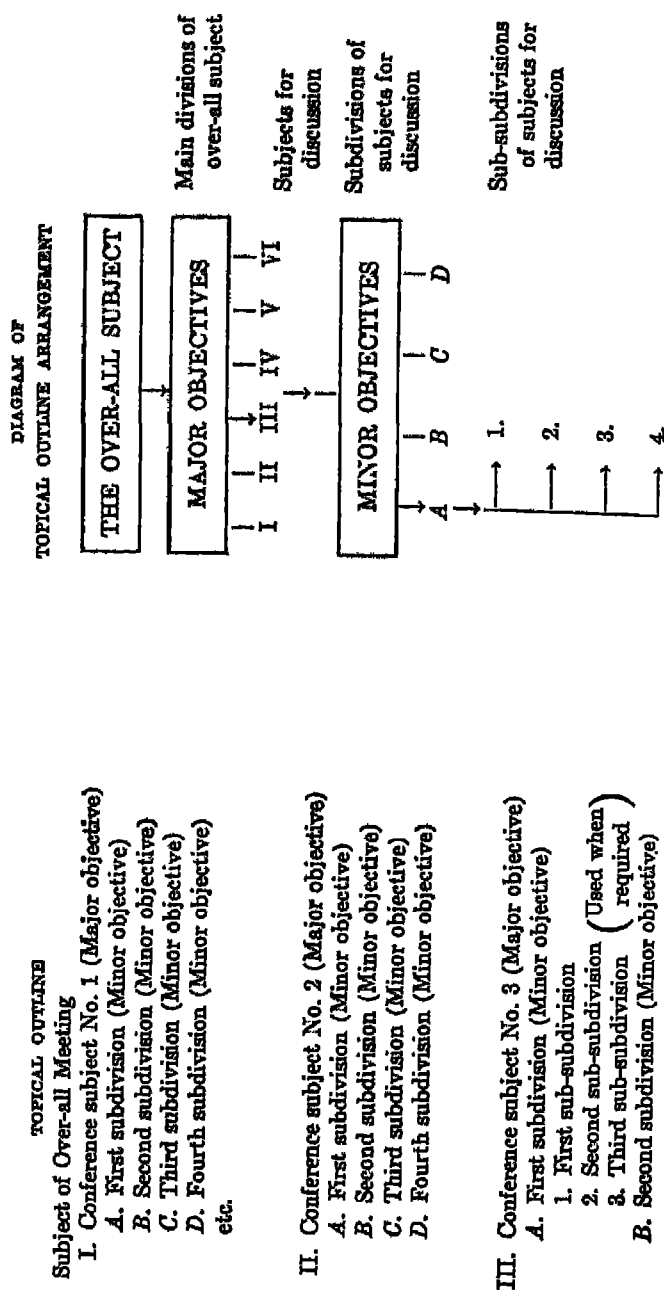


Fig. 27.—The principles and arrangement of topical outlines.

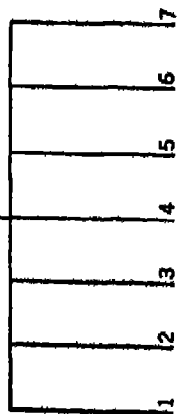
discussion. It does supply, first, a breakdown of the over-all meeting into separate conference subjects, and in turn, each of these conference subjects into the minor objectives that will have to be discussed in order to achieve the over-all discussion of the subject. This is consistent with what we have already covered with respect to conference discussion processes since, as has been pointed out, the over-all specific conference discussion process chosen for the handling of each major division of our conference subject is composed of five steps. It is in the Drawing Out step, Step II, of the over-all conference process that each of the minor subdivisions or objectives making up the major objective or subject is handled as a separate conference discussion within the over-all discussion. It can, therefore, be seen that the topical outline furnishes the basic structure around which a conference discussion can be built. However, since it is merely topical in nature and determines only the scope and make-up of the discussion, it is not complete and has not been adapted to the needs of the conference leader. We can see, furthermore, that when a conference leader is to conduct an Informational conference based on prepared narrative material, the first step must be to prepare a topical outline from the narrative background material he is to use. The topical outline, therefore, is only the starting point for the leader in planning his actual discussion. It does represent the form in which much training conference and formal business conference material is prepared since it can be distributed to the conferees following the meeting. In this form, it is free from all the technical arrangement and variations necessary to the leader. It serves a double purpose as well as making it necessary for the leader to prepare his own personalized outline for conducting the conference. It would be impossible to prepare personalized outlines that would fit all conference groups and all circumstances since the handling accorded the various minor divisions will vary with the particular group's background and zone knowledge, the purpose of the meeting, and the time available for the discussion.

AN APPLICATION OF THE TOPICAL OUTLINE TO A TYPICAL TRAINING PROGRAM

Before we look further into the matter of adjusting the topical outline to meet the needs of the conference leader through proper

THE PRINCIPLE
THE OVERALL SUBJECT

THE MAIN DIVISIONS OF THE SUBJECT
(Number and Arrangement)



Break Each Subject Into MAJOR Objectives
(Question or Item for Discussion)

Break Each Major Objective into MINOR Objectives
Which Lead Logically to Major Objective

For Each MINOR Objective List the
Anticipated "Group Responses"
and Related Remarks

TYPICAL APPLICATION
SUPERVISORY TRAINING

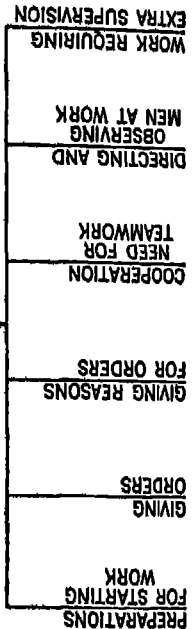
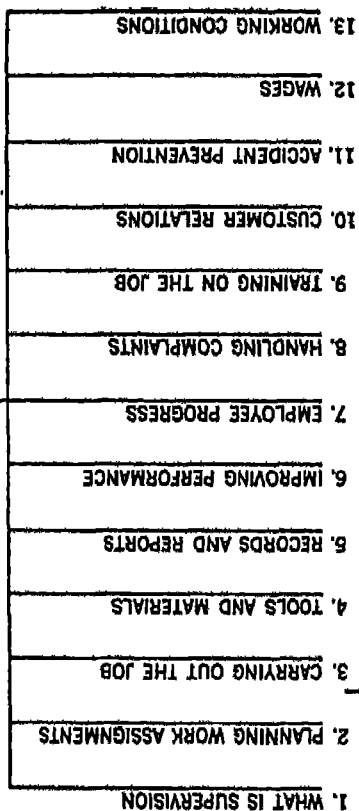


FIG. 28.—Typical application of topical outlines to supervisory training.

planning of the discussion, let us look briefly at a typical application of the topical outline to a supervisory training program as shown in diagrammatic form in Fig. 28.

In this figure we see that the supervisory training program that would take at least two weeks' time to cover in its entirety is made up of a series of meeting subjects that are subdivisions of the supervisory job, each of which might take one to three days' time to cover. In actual practice, a number of them might be given to a group gathered together for a week or they might be distributed over a years' time or even two years' time, with the supervisory group taking the most fundamental ones first and following up with the others from time to time in order to gain the advantage of actual experience on the job. Each of these individual divisions of the supervisory job represents then what we have termed in our topical outlines as the over-all subject. It is this subject that is broken down into major divisions or conference subjects each of which is, in turn, made up of the minor subdivisions that lead in logical sequence to the major division or objective.

As a matter of comparison and illustration, the material in this book covers what should be given in a training conference in which conference leaders are to be trained. The material, as is discussed in Chap. XVI, could be given over a period of two weeks covering the subject in detail for key leader training personnel. Although for conference leadership training, it should all be given in one continuous series, it would be possible to divide the material into one- or two-day conferences that could be given at separate times in the same way as the supervisory training mentioned above. In such a case, we would have to associate together under a heading or title the chapters of the book that would be given in each two-day session. Our conference leadership training setup would then be in no way different from that shown in the supervisory training diagram.

CONVERSION OF A TOPICAL OUTLINE TO A LEADER'S PERSONALIZED OUTLINE

No topical outline, regardless of how complete and logical it might be, would meet the full needs of the conference leader in conducting a discussion until he had made the necessary decisions as to the type of meeting handling to be given each section of it.

He would also have to decide upon the over-all specific conference discussion process to be used for each of the conference subjects or major objectives. In turn, it would be necessary to decide upon the type of specific conference discussion handling to be accorded each of the minor objectives as complete conference discussions within Step II of the over-all conference discussion. This is really the start of the preparation of the leader's personalized outline designed to meet the needs of conducting a discussion for the particular type of group concerned. As we shall see, it is desirable to go even further in planning a conference discussion for it is well to prepare lead-off questions and to determine upon possible handling procedures through consideration of the various steps in the conference process and how they will be handled.

It is true that too much detailed preparation is not wise if it tends to fix a definite procedure in the conference leader's mind which he will attempt to stick to regardless of the group's needs or the situations that arise during the actual discussion. It is absolutely necessary, though, to decide in advance upon the type of handling to be given each of the major and minor objectives as well as to give some thought to the possible group reactions and responses during the course of the discussion. This tends to prepare the leader for possible eventualities as well as to give him some bench marks around which to build his thoughts and procedures for starting the discussion. In many instances, experienced leaders prepare quite detailed discussion plans using two or three different approaches and then discard them completely after they have performed their function of forcing the leader to think out all the ramifications and variations of the discussion in advance. Most leaders will take with them to the conference a personalized form of topical outline that includes notations as to the proposed type of handling, possible lead-off questions, key ideas upon which acceptance must be checked and, in Informational or Shaped Developmental discussions on the informational side, prepared summation statements. The leader does not use these things in exactly the form that he has them for he must, of course, adjust his procedures to the variations in the discussion and the group needs. However, they do contain some of the key ideas around which the discussion and the conclusions must be centered. Later, we shall have more to

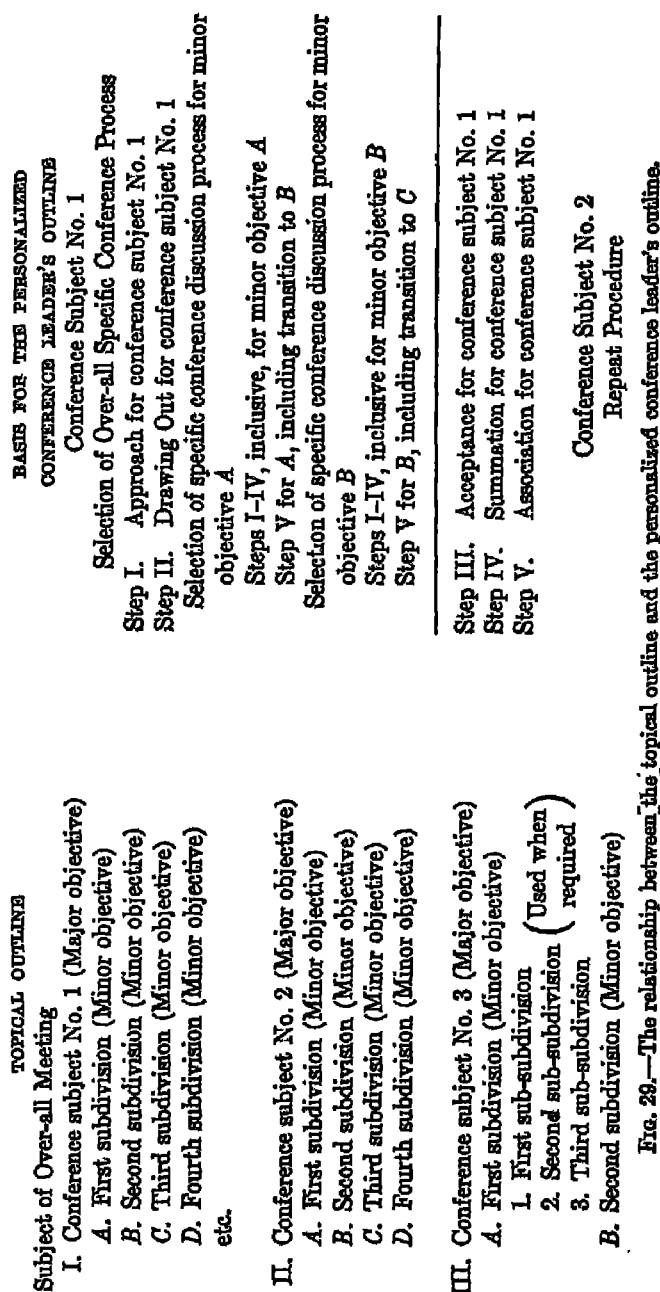


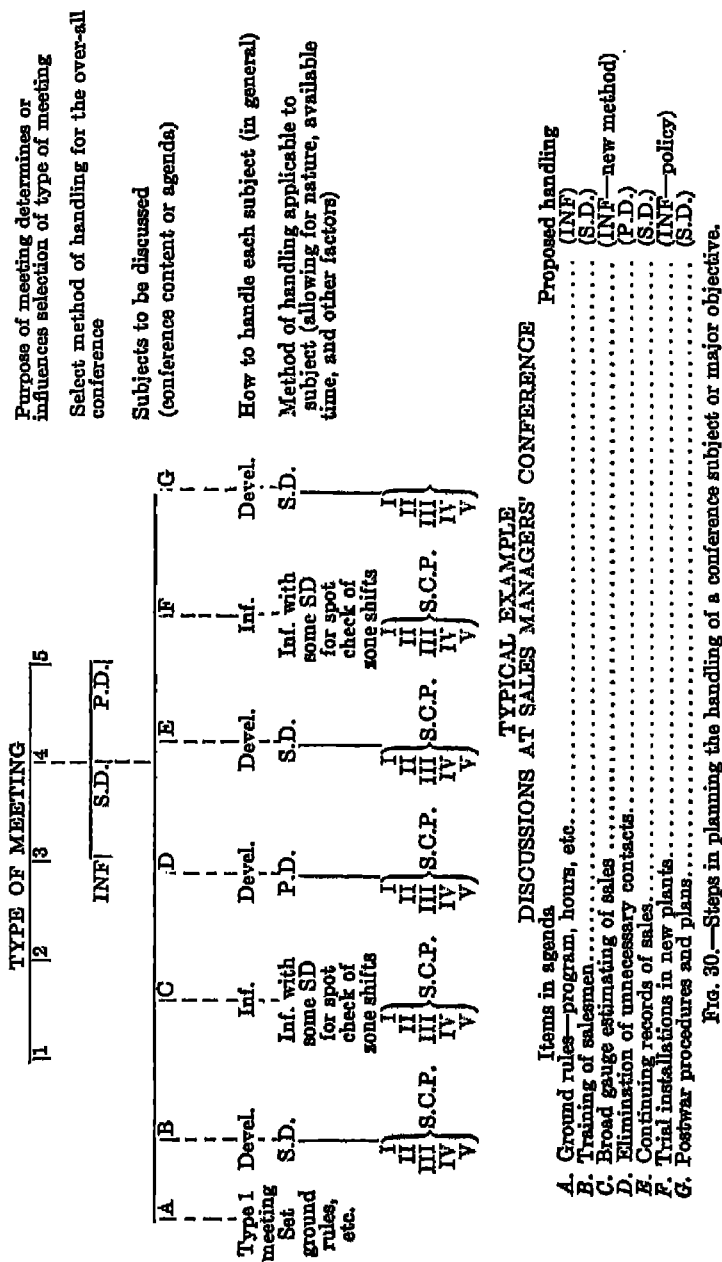
FIG. 29.—The relationship between the topical outline and the personalized conference leader's outline.

say in this connection, for the personalizing of topical outlines in an adequate though economical form is highly important to the leader and the success of the conference.

Before proceeding to more detailed consideration of this problem, let us consider Fig. 29. On the left in brief outline form is part of the structure of a topical outline with identifying letters and numbers. To the right, we have the conference step-by-step procedure as it would relate to the first major division or conference subject. This step-by-step procedure shows how the leader's personalized outline is formed as well as gives the basis for discussion planning. We see again that there is an over-all specific conference discussion process which relates to the conference subject. Within Step II of the over-all conference process, we find the series of five steps of the specific conference discussion processes which relate to each of the minor subdivisions or objectives. Through the adjustment of the topical outline to show the proposed methods of conference discussion handling for each of the major and minor objectives the leader arrives at his personalized outline. He then proceeds to the planning of the discussion in detail.

STEPS IN PLANNING THE HANDLING OF A MAJOR OBJECTIVE

In order to summarize and clarify the over-all meaning and significance of what has been discussed so far in this chapter, Fig. 30 has been included. It will be noted in the diagram that the first selection, as we have mentioned, is the type of meeting handling that will be accorded a particular subject. The purpose of the meeting determines and influences the selection of the over-all type of meeting which is, of course, determined by the predominating type of handling used for the various conference subjects. As a matter of interest, the first subject in an over-all series of conferences is often handled as a Type 1 meeting since its chief purpose is to make clear what the series of conferences is about and to set up the ground rules for the discussion together with any other information necessary to carrying on the meetings. As is shown in the diagram, the conference subjects to be discussed (major objectives) have their type of handling indicated together with the over-all specific conference discussion processes to be used. As a matter of completeness, in one instance, the



Purpose of meeting determines or influences selection of type of meeting

Select method of handling for the over-all conference

Subjects to be discussed (conference content or agenda)

How to handle each subject (in general)

Method of handling applicable to subject (allowing for nature, available time, and other factors)

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outline has been extended to show the specific conference discussion processes and steps used for minor objectives.

In a very broad sense, there are really two general classifications under which all major and minor objectives may fall. All of them may be either a direct objective or an indirect objective. Direct objectives are those of which the group is definitely conscious and which appear in the topical outlines and in the personalized leader's outlines. Indirect objectives are those where the group is not conscious of your aim. They seldom appear as part of the topical outline from which the leader's personalized outline is derived for they are general in nature and are usually a by-product that follows as a result of the direct objectives attained. Thus the group may reach conclusions which apparently are not set up as part of the logical, arranged sequence or aim. They are sometimes termed general impressions which the group receives as a result of the background and feeling built up in the discussion. An illustration of an indirect objective can be found in the opening session of a conference during which the leader is finding out the characteristics of each individual in the group although this does not appear in the actual topical outline nor in the leader's personalized outline which contains the direct major and minor objectives. Indirect objectives are very often sensed and felt by the group even though they are never crystallized through summation. They appear only occasionally in the leader's personalized outline and are usually stated as such in parenthetical form following the statement of the major objectives or subject.

TYPES OF TOPICAL OUTLINES PROVIDED FOR LEADER'S PLANNING PURPOSES

There are several ways of setting up topical outlines from which the leader's personalized outline is prepared. It is not particularly important which one is used for obviously the best one is the one that appeals to the leader himself. Topical outlines for leader's use in formal business conferences and training conferences such as supervisory or job training are often brief as to wording. The statement of the major objective or conference subject is occasionally followed by a descriptive and limiting paragraph where it is necessary. Below this statement, the minor objectives, which are sometimes called group responses or

major points, are listed. No matter what they are called, they should lead in succession to the major conclusion if they are well chosen. To the right in another column under a heading such as remarks, related information, or minor points is listed pertinent information applying to the items in the topical outline. Although the heading given this column often varies a great deal, its purpose is always the same. Sample sheets from three types of topical outlines have been included at the end of this chapter.

In preparing personalized leader's outlines, many leaders make marginal notes on the topical outline indicating the type of handling for the major and minor objectives by the letters INF., S.D., and P.D. Lead-off questions to start the discussion can also be written in the margin together with such comments as "watch for" and "bring out" indicating particular points to stress, and brief reminders as to illustrative stories. As a general rule, however, it is most desirable to prepare a personalized outline for each day's session basing it upon the topical outline provided with the course material. This is a much more satisfactory and flexible plan since the leader then tends to plan and conduct the discussion with the characteristics of that particular group in mind.

VARIATIONS IN PERSONALIZED LEADER'S OUTLINES

A leader should always attempt to avoid the use of type-written or printed outline material laid open upon the table before him. This is particularly bad in Purely Developmental and Shaped Developmental conferences on the purely developmental side since it gives the group a feeling that the answers have already been determined upon by the leader. The best plan is for the leader to make his complete analysis and personalized outline for each day's session during the preceding day or evening. After studying them thoroughly, he then prepares brief pencil notes covering the major objectives, the minor objectives, the subject handling, lead-off questions, acceptance points to check, and also summation statements in Informational conferences. These can be prepared for each major objective (conference subject) and only those few sheets pertaining to the particular subject under discussion should be in view during the discussion. Loose cards or sheets not included in a notebook are best, for in training conferences or in some formal business conferences it is

desirable to give the group a feeling of spontaneity and control. If the leader's outline for use in the conference itself is brief the natural tendency for the leader to stick closely to a formally prepared, detailed leader's outline is eliminated. The brevity of his outline causes the leader to permit a more active, natural flow of discussion since he is not consciously trying to shape each little trend to make it conform to preconference ideas.

Earlier in this chapter it was pointed out that the wording of the topical outline is not designed for direct use by the conference leader. In converting the topical outline to a personalized leader's outline, the wording of the statements of the major and minor objectives should be carefully reviewed and studied. Since they are in topical outline form, they are not always directly usable by the leader in conducting his discussion. The statements must be checked as to brevity since a long random statement cannot be used effectively to indicate to the group the subject for discussion nor for summation purposes. Ambiguous or vague words and phrases must be either eliminated or defined. The leader should be careful to reword the statements of major and minor objectives which he will use to summarize the Approach step in order to give the group a clear-cut picture of what is to be discussed. Any ambiguity or vagueness only leads to confusion.

All statements used by the leader must distinguish carefully between the general and the specific. The group must know whether they are discussing the general phases of the problem or specific, limited applications of it. Whenever these two things are confused or combined within the same discussion, it is doubtful that a satisfactory conclusion can be reached.

PRELIMINARY PLANNING OF ACTUAL DISCUSSION CONTENT AND FLOW

Many leaders find that making detailed, preliminary discussion plans aids them in conducting a conference. These discussion plans are of a rough nature and are based on the leader's personalized outline. As a general rule, leaders make two or three different ones covering all readily foreseen variations and then discard them, depending upon only their brief personalized outline with its marginal notes for the actual discussion. This leaves the leader in a flexible frame of mind and helps him to size up and meet situations as they arise. Leaders are thus able

to adapt themselves better to actual conference trends as they take place and have a higher degree of perception. The steps in such actual conference discussion planning are as follows:

1. Select over-all specific discussion process for major objectives
2. Set up your Approach
 - a. Method of approach (rehearse and tie in)
 - b. How much discussion
 - c. What to look for to isolate idea or objective
 - d. Plan discussion distribution
3. Plan Drawing Out step
 - a. Transition from Approach to first minor objective
 - b. Selection of specific type of discussion process for minor objectives and planning of discussion as to distribution and extent on a step-by-step basis
 - c. Decision on what to watch for and pick out in Step II of the specific conference process
 - d. Selection of hints for checking zone shift and distribution of discussion
 - e. Decision on points to check in making certain group acceptance has been achieved
 - f. Summarizing statement for Step IV (not necessary if your minor objective in outline is stated in form to be used for summation)
 - g. Statement of indirect objectives, if any
 - h. Transition to next minor objective (this cycle is repetitive for minor objectives leading up to major objectives)
 - i. Check as to over-all major objective status, *i.e.*, zone shift and distribution before group acceptance of major objective is checked

Notes: Select individuals for discussion participation and order of participation on basis of type and estimated zone knowledge.

This, of course, must be adapted and modified to suit actual conditions in discussion, reactions, interest, and changes in zone knowledge.

Use comparative discussions not only to provide zone-shift material but to bring out points you are looking for and wish to interject.

4. Make plans for checking group acceptance
 - a. Decide upon degree of group acceptance possible for type of specific discussion process used and the group members participating when characteristics are known
 - b. Plan extent of discussion necessary to check group acceptance for over-all major objective by knitting together the cumulative results of acceptance obtained for the minor objectives
 - c. Review any possible reasons and points why it might be necessary for discussion to revert to Step II, Drawing Out, so as to anticipate such a turn
 - d. Phrase possible transitions to Step IV, Summation
5. Summation for major over-all objective
 - a. Prepare and word clearly and economically so that you may run over in your mind and use as a check before you actually summarize and place on board

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- b. Phrase questions to be used to see if limit of Step III has been reached
- c. If major objective is properly stated and worded in outline, it serves also for summation statement

Note: Check upon indirect objectives, if any. Sum up in a statement any that are to be expressed.

6. Association for major objectives

- a. Plan and word statements to be used so as to relate the objective properly in over-all chain as well as with respect to preceding one
- b. If possible to do so subtly without its being noticeable or awkward, sow seeds for next approach and an easy transition. Check to see if this major objective is in proper place

Note: During planning keep in mind and allow for sowing seeds for future development as well as for bringing in Zone A information when required.

CONFERENCE PLANNING AND THE DAY-TO-DAY BUSINESS CONFERENCE

Much of what we have covered in this chapter will apply more directly and readily to purely training conferences and formal business conferences where there is opportunity for detailed preparation of topical outlines, personalized leader's outlines, and narrative background material. Although force of circumstances and the nature of the everyday business conference do not always warrant the full, detailed, complete conference preparation and planning procedures, it does not follow that it can be successfully conducted without some thought and preparation. Obviously, any reasonably skilled conference leader who knows the principles involved and the possible specific conference discussion processes can formulate a plan of attack on his feet when forced to do so and conduct a conference without advance preparation. In such instances, the leader must be alert at all times and have a high degree of perception since he is in reality forming his plans and making his adjustments as he proceeds. The day-to-day business conference does necessitate such preparation as is essential to intelligent handling; a topical outline must be available if the conference is to have any direction whatever. Where necessary, the leader can match his handling to such an outline on the spot as well as determine his check points as he goes along. It is wisest, however, to supplement the topical outline with a personalized leader's outline in advance of the session. It should contain pertinent material such as hints on the conference dis-

cussion processes to be used, lead-off questions, key check points for acceptance, and, where the nature permits, suggested summation statements. Another important feature of the day-to-day business conference, where a great deal of use of specialists is made as contributors on an informational basis, is the scheduling and arrangements for such contributors as part of the leader's outline.

Conference discussion planning is most important to successful conference leadership. In this respect it is no different from the planning and preparation given to other business activities. In many ways, it is more important than the normal planning of production activities for, unless systematic, sensible, economical conference leadership methods are used in the higher levels of supervision where the basic policies and plans are determined, the best of production plans may be fruitless.

SAMPLE A

LEADER'S OUTLINE

Supervisory Training

How Do We LEARN ABOUT OUR RESPONSIBILITIES—NUMBER, NATURE, EXTENT, ETC.?

GROUP RESPONSE

REMARKS AND EXAMPLES

1. From our boss

Boss should train us as we train workmen

For example, the training of first-line supervisors is a specific responsibility of the second-line people. At times, this responsibility is delegated to the conference leader, but like any other, can never be relinquished by the individual who is primarily accountable.

2. From knowledge of job obtained while in preceding position

Just as we watch *our* boss handle *his* responsibilities

3. In conferences such as this

Our bosses have delegated this part of their training job to conference leader. Similar to plant-school training for workmen

4. Talking with other foremen

Find out how they do their job

5. Experience—working on the job

Has limitations of trial-and-error method of learning

6. From employees

Training in reverse

7. Study practices, instructions, and other pertinent information

Includes union agreement, current literature on supervision, outside material, etc.

Note: Ask conferees how *they* found out what they are supposed to do as supervisors. In some instances, there may have been a definite lack of comprehensive training.

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SAMPLE B

LEADER'S OUTLINE Job Instructor Training

SUBJECT—ASSOCIATION OF IDEAS AND ITS RELATION TO LEARNING

METHOD OF HANDLING—Informational for 1, 2, and 3; Shaped Developmental
Check of Key Ideas

MAJOR POINTS

1. If questioned, most of us would say we learn by hearing, seeing, studying, reading, original thinking, etc.

MINOR POINTS AND RELATED INFORMATION

- a. These are only mediums through which learning is achieved.
 - b. For example—how much reading, hearing, seeing would be needed to learn what TNT is? Almost everyone knows what it is without knowing what it looks like. If you had never heard or seen an explosion could you have any picture of what TNT will do?
 - c. What chance would you have of developing the idea of radio broadcasting in the mind of an African native if you had no apparatus or equipment other than what is usual in the jungle? What would his mental picture be? Vice versa, how could a native build up in your mind the mental pictures he has when the tom-tom beats?
2. Before any idea can be gained or learned, it must be expressed in terms of or tied in with something the learner already understands and knows.
 - a. It must be in words that bring up an old idea or ideas that the learner already knows and understands.
 - b. The words used to give the ideas to the learner must mean the same thing to him and the teacher—that is, give the same mental picture.
 3. We learn by *association of new ideas with old ideas* which we already know and understand.
 - a. We learn anything more easily and completely when we have more past experience to associate with the new idea or condition.

Key Ideas to Check for Group Understanding and Acceptance

Major points—Check all three.

Minor points and related information—2a, 2b, others if needed.

SAMPLE C
LEADER'S OUTLINE
HANDLING OF GRIEVANCES

LEADER'S REMARKS	GROUP RESPONSE	EXPLANATION AND SUGGESTIONS
What procedure should be followed when handling a grievance?	<ol style="list-style-type: none"> 1. Listen to the complaint 2. Investigate and review 3. Make decision or recommendation 4. Ask for advice 5. Carry out decision 	<p>Receiving the facts as the man sees them Checking both sides of the story</p> <p>When judgment indicates Taking action when necessary</p>
Let us look at the first step—listening to the complaint	Show willingness to hear and consider	Listen with an open mind
What should our attitude be toward complaints?	<ol style="list-style-type: none"> 1. Let him get it off his chest 2. Get the story straight (ask questions so as to have man review story) 3. Discuss—do not argue 	<p>This gives man a chance to cool off Develop that to the mind of the employee with a grievance, all his facts, statements, or opinions deserve to be heard with sincere interest Argument leads to all kinds of difficulty, such as Biased opinions Determination to win the argument regardless of facts Personal bad feelings</p>
If a man came to you in a wrought-up state of mind, how would you handle the conversation?		
Let us consider the second step in handling a grievance—What is the purpose of investigating and reviewing?	To verify the man's story	Some of his statements may be based on misunderstanding
	Get additional facts Review our responsibility in the case at hand	Other persons may be able to add ideas or information
Will this step hurt a man's feelings?	Not if supervisor is frank with the man	Tell him you are going to investigate and why
Should we omit this step in the interest of a quick decision?	Prompt handling is important but correct decision rates first	
When should you consult your supervisor before making a decision on a grievance?	<ol style="list-style-type: none"> 1. When you need advice 2. Question of authority 3. Question of information, such as interpretation of working practices 4. Involved cases 	<p>When matter is important enough that your supervisor may want to make suggestions When employees outside your own group are involved</p>

CHAPTER XV

THE CONFERENCE SETTING

IMPORTANCE OF PROPER CONFERENCE SETTINGS

There is another side to conference planning other than the planning of the conference discussion itself and the preparation of the leader's outlines. It concerns the conference setting, which involves many of the physical conveniences as well as the conference room itself, for the group reactions are going to be affected to some degree at least by the surroundings in which the conference is held. A great deal of good material relative to the conference setting is readily available, so in our rather brief treatment of the conference setting we shall restrict ourselves to the basic requirements essential to holding a satisfactory conference.

From our standpoint conferences fall into three general classifications so far as the setting is concerned. These are the purely training conference, the formal business conference, and the day-to-day business conference. Much of what we shall cover in this chapter relates more to the purely training and formal business conference than to the day-to-day business conference which is very often conducted on a catch-as-catch-can basis in the private office of the leader or one of the group members. It is, of course, highly desirable that even the day-to-day business conference be conducted in the proper type of setting, and many businesses and industrial organizations now provide regular conference rooms for this purpose. It is no longer unusual to find excellent conference accommodations and arrangements provided for day-to-day business conferences as well as training and formal business conferences. The advantages of such an arrangement are easily discerned, for the very act of isolating the conference from the regular routine of business does much to enhance its effectiveness as well as its continuity of procedure. A sufficient number of properly arranged and outfitted conference rooms should be provided for the conduct of any business.

Whenever it is necessary to hold a day-to-day business conference in the private office of one of the group members, it is

most important that arrangements be made to route telephone calls and individuals having business with the conferees through a secretary or clerk who will keep interruptions to a minimum. When such conferences run over an hour or two, the leader should be sure to provide a recess period during which important contacts can be made with the members as well as to give the group members a break in the session.

Conferences are one of the chief means of operation for supervisors, superintendents, and executives in or above the second line of supervision. As we have pointed out, the sum total of their activities consists chiefly of contacting and meeting with other supervisors and officials, in an effort to decide upon and place in effect the proper policies and procedures as well as to give the necessary supervision to the day-to-day running of the business. Failure to provide the proper setting and arrangements for day-to-day business conferences does much more to handicap the supervisor in the use of one of his chief tools than is realized. It is, without doubt, one of the most wasteful and uneconomical procedures encountered in modern business. There is seldom any question raised as to providing the proper tools for the productive employees to carry on their crafts, for the necessity of such things cannot help being realized because of their physical nature and their direct requirement in production. The more abstract, intangible tools of the supervisor and official are just as important and in many ways even more important owing to the controlling and far-reaching effects they have on the conduct of the business.

THE CONFERENCE ROOM

When conference rooms are provided, care should be taken to supply an entrance office for the use of the secretary or clerk whose job it will be to act as traffic cop with respect to telephone calls and people seeking to contact the conferees. Wherever suites of conference rooms are set up, it is possible so to arrange them that one secretary can care for two or three conferences. The time devoted to acting as secretary need not be lost from active production, since the individual can spend his time doing routine clerical work or other productive assignments that can be readily relocated to the conference anteroom. In most instances, typing work is not desirable because it tends to provide a back-

ground noise level for the conference unless the doors and partitions are particularly well constructed.

Conference rooms should be well lighted and ventilated and the heat regulated so as to make the room comfortable but not warm to the point of drowsiness. In training conferences and formal business conferences one of the group members should be assigned the job of seeing that the light, heat, and ventilation are properly adjusted at all times. The conference table and the chairs about it should be so placed as to eliminate the chance of direct glare from the sun or outside light shining directly in the eyes of the conferees or the conference leader or on the easel or board upon which written material is presented. Failure to observe these rules is bound to result in continued drain upon the energy and the attentiveness of the group.

Conference rooms must be so chosen and located that no noise or outside distractions will destroy the group's ability to concentrate on the problems at hand. All too often in the past have conference rooms been provided in locations where the noise of production operations, passing traffic both internal and external to the building, and other sources of noise have prevented satisfactory conference operation.

CONFERENCE-ROOM FURNISHINGS AND EQUIPMENT

One of the failings most often noted in setting up conference rooms and arrangements lies in the provision of a conference table that is too narrow for its length. A conference table should always be wide enough to permit group members to see the leader, their associates, and the easel. A narrow conference table gives a cramped feeling, obstructs the view of the group members, and leads to constant shifting of positions and flagging interest. Conference tables should be six feet in width; many supply firms now provide center pedestal tables six feet square equipped with interlocking wedges so that they may be joined together to form a conference table of any desired length. The advantages of center pedestal tables are more than obvious to anyone who has ever attended a conference and been unfortunate enough to occupy a position where he had to ride table legs like a tired jockey. Conference chairs should not be so comfortable as to inspire recurring attacks of executive complex; at the same time, they must not be so hard and straight that they produce the first

symptoms of rigor mortis in the conferees. They should be provided with arm rests and the backs should be comfortable and inclined slightly to the rear. The seats and the backs should be adequately upholstered for comfort but not approach an overstuffed condition. The leader's chair should be light enough so that it can be easily and readily moved by the leader during the session as he finds it necessary to write upon the board.

It is, of course, essential that a sturdy, well-built easel be provided to hold the large three- by five-foot sheets of paper used by the leader during the discussion. Such an easel should have a satisfactory bearing board for the paper to rest upon and adequate clamping devices including a holding metal or wood strip at the top of the board. An easel is easily built as an A-type frame with the legs to which the front board is attached inclined so as to make an angle of about eighty degrees with the floor. A suitable tray to hold the crayons, the pointer, and a straightedge for drawing must be provided at the bottom of the bearing board.

Thermos jugs and sanitary paper-cup containers placed at satisfactory intervals along the conference table are to be preferred over placing them on side tables or using water coolers, since the group is not continually interrupted by the necessity for moving to secure a little water to ease a dry throat.

Present-day training and formal business conferences make a great deal of use of visual aids such as slide projectors, sound slide film machines and motion-picture projectors. A well-equipped conference room provides outlets for them as well as satisfactory equipment tables and screens. In arranging for conferences requiring the use of visual aids, it is sensible to make arrangements for machine operators well in advance of the conference and to require a check of equipment and a preliminary test showing of the films prior to the start of the day's session. As a safeguard to the satisfactory presentation of visual aids, spare projector tubes and bulbs should be provided so that the showing will not be interrupted in the event that they should burn out.

AVAILABILITY AND ADEQUACY OF CONFERENCE SUPPLIES

Conference supplies should never be neglected, for a lack of them forms a source of petty annoyance to both the leader and the group members. Notebooks, paper, pencils, erasers, and

fountain-pen ink should be available. The leader should see that all necessary reference material pertaining to subjects to be discussed is available on a side table and, for formal business conferences, such company instructions and job practices as might be needed. In training conferences, he should make sure that reference books and text material are available. The material that he intends to distribute should be properly assembled. As a general rule it is not wise to distribute written material in advance of its consideration by the conference group. Consequently, it is often desirable to distribute the material at the end of the sessions covering particular conference subjects (major objectives).

Charts that the leader plans to use should be prepared in advance so that he does not have to take the time to draw them upon the board as he requires them. Very often, the leader provides a second easel holding the charts properly arranged and numbered. A cover sheet should be supplied for this easel so that it will not form a distraction for the group. When the charts are not in use, the best practice is to turn them all to the front of the easel allowing the cover sheet to blank them out. When they are properly numbered in the lower left-hand corner, the leader can readily find any chart he desires and turn those preceding it over the top of the easel with little delay.

One type of conference supply essential to the success of the average formal business conference is cigars, cigarettes, and pipe tobacco, which appear to be practically indispensable conference aids to the average businessman. Although they are provided for the formal business conference and, in some instances, the training conference, the participants in the average day-to-day business conference soon learn to come to the conference self-supplied.

RECORDING OF CONFERENCE HIGH LIGHTS

The need for a secretary to control the traffic to the conference room was touched upon in the introduction to this chapter. Such a secretary does not play a part in the actual conference itself. It is highly desirable that, in formal business conferences, some provision be made for recording those sections of the conference discussions which should become a record of the meeting. The conferees should carry away with them a résumé of the decisions reached as well as an outline of pertinent sections of the

more important discussions. As has been pointed out previously, many times we loosely use the word "conference" to cover relatively large gatherings of thirty to a hundred people. In such meetings it is obviously impossible to provide for the complete interchange of ideas and reactions necessary to attaining reasonable expectancy of group understanding and acceptance. Such a meeting more nearly falls somewhere between a Type 2 meeting in which information is given and opinions requested and a very weak form of a Type 3 Informational conference. Occasionally, there may even be small sections of the meeting which take on some of the characteristics of a Developmental discussion, although they never can be truly characteristic of a Developmental conference type of meeting, primarily because of the size of the group. In such conferences a large part of the time is usually devoted to having officials and special authorities give informational talks followed by some group discussion. Usually most of the conferees, if they can be so called, divide their attention between thoughtful consideration of the subject material and hurried attempts to make notes as to the more important points made. It is highly important, in so-called "conferences" of this type, not only to distribute material at the end of each discussion covering what was presented but also to provide a recording secretary or stenotypist who can make a record of the pertinent parts of the discussion. It rests with the leader to indicate when such a record should be made; at times it may be necessary to ask for clarification and repetition so that it can be properly recorded. Only through such a procedure is it possible for the members of the meeting to realize its full value for attempting to make notes and to give thoughtful consideration at the same time usually results in accomplishing neither one satisfactorily.

In day-to-day business conferences, the leader should assign one of the members to make a record of the points covered and the decisions reached with respect to them. This record should be transcribed following the conference and copies sent to each participant.

SUPPLEMENTAL CONFERENCE ARRANGEMENTS, SCHEDULES, AND VISITORS

Among the other conference arrangements that a leader should not neglect to provide, we find such things as greeting the con-

ferrees upon their arrival and introducing them to those whom they do not know, making hotel reservations, and securing railroad tickets and accommodations. It is also advisable to provide facilities for cashing checks and making telephone calls. Many existing books treat this phase of arrangements most thoroughly.

Very often an over-all conference will consist of a series of several meetings or conferences extending over a period of days. This is particularly true of formal business conferences, where the group participating in the different discussions may vary from discussion to discussion and from day to day. In such instances the leader must set up a reasonably exact schedule of participation and provide for the notification of the group members so that their arrival will be timed properly with the conference sessions. A schedule should also be provided for training conferences that last for one or two weeks. In addition, in any type of conference, it is quite often necessary to call for the short-time attendance of specialists and authorities who make their contribution to the conference and then retire, since they take no part in the conference procedure itself. Such arrangements should be clean-cut; the specialist participants should be saved the embarrassment of trying to determine for themselves just when they have completed their contribution and their services are no longer required. Sometimes it is possible to make these periods coincide with natural recesses or breaks in the conference procedure. Where this cannot be done, it is the leader's responsibility to indicate when the services of the specialist have been completed and to thank him for his contribution. Failure to carry out such a procedure in a tactful, helpful way only leads to embarrassment for all concerned.

The visits of "brass hats" and high company officials who are not going to participate in the conference as conference members nor take over the conduct of the conference must, of course, be similarly scheduled in accordance with understandings reached with them prior to the start of the conference series. There will occasionally be circumstances under which the official involved will not be able to coordinate his other business with the conference schedule as planned. Under such conditions, the courteous and safe procedure is to extend the privilege of attending at his convenience. However, when he arrives the leader should

be careful to terminate the conference session as such and to make all-round personal introductions of the group members when necessary. The wise conference leader will, whenever possible, provide for the brief attendance of executives and officials since it automatically gives the conferees a feeling of support and cooperation on the part of higher management. In many instances those officials directly concerned with the phase of the business under consideration will participate in certain parts of the group discussions or take over the conference for certain sections of the session. In purely training conferences much is to be gained through providing for scheduled visits of higher officials, although the number should not be so great as to interfere with the conference sessions attaining the objectives. It cannot help giving the conferees a feeling that management is back of both the conference and its objective.

THE SETTINGS FOR THE DAY-TO-DAY BUSINESS CONFERENCE

Our discussion of conference settings has its widest application, as we have said, in the purely training and formal business type of conference. Since by far the greatest number of conferences conducted in business and industry are of the day-to-day business conference nature, we must keep in mind that often it will be necessary to approximate the ideal condition insofar as possible. One thing that should not be neglected, however, is the provision of a light and sturdy type of portable easel and board which can be set up in a private office for use in daily business conferences. Such easels and bearing boards are of the same general construction as the large ones provided in conference rooms but use smaller size paper. A three- by three-foot size is highly satisfactory for portable easels. The provision of these easels, paper, crayons, and pointers makes it natural for the day-to-day business conference leader to record the pertinent points under discussion and the variations in the group discussion as well as the summation of the conclusion reached.

When private offices are used for day-to-day business conferences, it is difficult to restrict the number of interruptions to the same degree as is possible in a regular conference room setup. However, there is seldom any reason why a secretary or clerk cannot handle and control all the telephone and other traffic directed towards the conference group while they are in session.

It is seldom possible to effect much control over the sources of outside distraction, such as traffic both outside and inside the building or the noise incident to productive work operations, in the catch-as-catch-can day-to-day business conference. Through rearrangement and reassignment it may be possible sometimes for the leader to reduce the annoyance due to productive work operations.

Conference settings are important to the success of the conference and the leader should not fail to do everything within his power to provide the best conference setting available under the circumstances in which he finds himself. Although many of the distractions, if neglected, only become petty annoyances to both the leader and the group, their cumulative effect over a period of time can be such as to decrease greatly the effectiveness of the whole discussion.

CHAPTER XVI

CONFERENCE LEADERSHIP TRAINING PROGRAMS

ADJUSTMENT OF LEADERSHIP TRAINING TO THE NEEDS OF VARIOUS SUPERVISORY LEVELS

Now that our study of conference leadership methods and techniques has been completed, we would be most impractical if we failed to organize the material into possible conference leadership training programs designed to put the principles into everyday use in business and industry. Previous chapters in this book have covered the various phases of conference leadership in detail. Each move and motive have been examined from the standpoint of supplying all that it is desirable for a conference leader to know and, in particular, what is necessary for those who are to train others in conference leadership.

Common sense tells us that, although ideally everyone who uses conference leadership should master all the principles and practices, the practical operation of a business organization will demand that each foreman, supervisor, superintendent, and executive be given only what he needs. Thus the foreman and first-line supervisor concerned chiefly with the handling of productive workers will require a streamlined version of conference leadership suited to their needs. The time spent on methods and procedures will be reduced to a minimum while much stress will be laid on actual trial practice leading sessions supplemented by follow-up assistance after the return to the job. When we go the second level of supervision and higher in the organization, we find that the jobs consist chiefly of dealing with other levels of supervision rather than handling actual productive workers. The activities of these executives are largely made up of a continuing series of contacts, with a large number of day-to-day business conferences included. These men need a more complete training in conference leadership methods and motives than the first-line supervisor, together with actual practice sessions in leading and supplemented by follow-up assistance upon their

return to the job. Although the nature of their day-to-day work requires a more extensive knowledge of conference leadership than the first-line supervisor, they still do not require the detailed information necessary to the key leader who gives them their training. The full and complete detailed training in conference leadership methods, motives, and analysis is, of necessity, required by the key conference leaders who conduct the conference leadership training conferences for the other two groups. In addition to these three different types of conference leadership training programs that equip those taking them to put leadership in actual practice, it is often necessary to provide for higher executives a brief appreciation of conference leading that does not equip for leadership. Its purpose is to give what might be termed a "Cook's tour" appreciation of what conference leadership includes and does. This usually requires about three or four hours' time. Through its use higher executives can be acquainted with the content of a proposed program so that they can decide whether or not they wish to place conference leadership training in effect. One of its chief advantages lies in the fact that it gives higher executives an understanding of the principles involved so that they can consciously cooperate with other levels of supervision who are putting them into practice. In the "Cook's tour" type of appreciation, no actual practice can be given; however, it is often wise to conduct a brief demonstration discussion of a closely shaped nature, using the executives themselves as a conference group.

THE FIVE STEPS IN PLANNING CONFERENCE LEADERSHIP TRAINING PROGRAMS

Before we proceed with the detailed development of the four types of conference leadership training programs mentioned above, we should consider the steps necessary to planning the over-all conference leadership training for a business or industrial organization. The problems of the small individual business and the large, nationwide industrial organization are basically the same, differing for the most part in the numbers involved and the scope of the program. Thus where the conference leadership training needs of the small individual business could be readily met by a single trained leader who would do such training as was required under all four of the types mentioned above, a large

industrial organization would require one or more highly trained key leaders at different points over the country. Furthermore, the large organization might find it desirable to provide conference leadership training on a continuing basis at different levels of the organization by training certain well-suited supervisors to conduct training conferences on an as-required basis, rotating the assignment among them.

The first step in the provision of conference leadership training is to sell such a project to the executives whose approval is required. The "Cook's tour" type of appreciation of conference leadership is most useful in this connection and is readily supplemented by providing a copy of "Conference Leadership in Business and Industry" for those who wish to investigate the subject more fully. Assuming that the necessary approvals have been obtained, there are five major steps in setting up an over-all project of conference leadership training. These are

1. The provision of trained conference leaders to conduct the leadership training conferences.
2. The organization of a continuing program of leadership training for first-line supervisors and those in or above the second level of supervision.
3. Follow-up checks and assistance in applying leadership on the job.
4. Brief refresher training after six to twelve months.
5. Continuing observations, checks, and assistance through normal lines of organization and supervision.

THE PROVISION OF KEY CONFERENCE LEADERS

In order to provide trained key conference leaders to conduct the conferences for training supervisors in leadership, it is desirable to give them the full, complete leadership training. This usually requires about two weeks' (ten days') time for a group of from eight to twelve. The maximum number that can be handled effectively is twelve, while less than eight makes it difficult to hold satisfactory practice leading sessions. In a later section of this chapter, the complete two weeks' program is set up and discussed at some length.

Some independent businesses would usually find it uneconomical and unnecessary to provide more than one or two men with the full, complete training and, in some cases, these men

would actually do all the leadership training for the organization. In such cases, it might be necessary for the men selected to obtain their training through any local agencies which might supply such training or colleges or universities doing extension work of this nature. It is quite possible for a well-equipped training director or supervisor to develop the necessary techniques himself after a thorough study of the principles involved since he has the necessary background of training and supervisory experience.

CONTINUING LEADERSHIP TRAINING FOR ALL SUPERVISORY LEVELS

Conference leadership training programs for first-line supervisors may be set up on either a three-day limited program basis, where only one round of practice leading sessions is provided, following a minimum treatment of methods and theory, or on the five-day program plan. When the three-day program is used, the field follow-ups and checks that take place after the first-line supervisors have put into practice the leadership principles in their day-to-day conferences and dealings with their employees constitute the means for rounding out their training. This is often a most satisfactory plan since it does not load them up with too much beyond what they need in the way of methods and practices before they apply it in a practical way. As a general rule, first-line supervisors and foremen are not so constituted as to react readily to too detailed a study of methods and techniques prior to actual use on their day-to-day jobs.

Many organizations will find it suits their practices and setup better to provide the first-line supervisors and foremen with the same type of five-day program as is given the supervisors and superintendents above the first line. This is particularly true in businesses and industries in which first-line supervisors and foremen are more highly and technically trained than in those in which they do not make much use of the more technical or paper skills. Within the same organization, it is quite possible that first-line supervisors and foremen who handle construction or craftsmen will require the three-day program while other first-line supervisors handling technical groups which do work more of a mental than a manual nature will need the same five-day program as second-line supervisors and administrative and executive officials.

The bulk of conference leadership training will be given to the levels of supervision at the first line and above since the brief appreciation (Cook's tour) and the two weeks' full training are given to relatively small groups. A program of this nature must, of necessity, be set up on a continuing basis in order to provide conference leadership for newly created supervisors. However, the load is heaviest during the initial phases of the program when all existing supervisors are being given the training. After this group has received its basic training, the continuing activities consist of training new supervisors and giving brief refresher training to those who require it. Both the three- and five-day programs are outlined in detail in this chapter.

ON-THE-JOB FOLLOW-UP CHECKS AND ASSISTANCE

No training program can be really successful unless it provides for some type of follow-up of those trained after they return to the job and put the principles learned into actual practice. This not only tends to ensure the principles being put into practice but also provides those trained with assistance at exactly the right time, since most of us encounter problems that may cause a little difficulty. If, after a period of two to four months has elapsed, an opportunity is provided for the trainee to discuss his experiences with a key leader, many of his difficulties will be ironed out. Of course, much incidental assistance can be given by supervisors and superintendents to whom the supervisors concerned report if they, too, have had the training. It is always essential for the success of any program for the supervision up the line to have had either the same training or at least an appreciation of it so that the necessary assistance and cooperation can be given. The actual, practical use of conference leadership material on the day-to-day job is what really counts for it is there that the results desired can be accomplished. It is in his day-to-day business conferences that the average supervisor will build up and gain his skill in conference leadership methods, using the material he obtained in the training conference as his foundation.

REFRESHER TRAINING SESSIONS

Refresher training conferences of three days' duration are found to be most helpful for first-line supervisors after they have been using the material for no less than three to six months.

This gives them a chance to review what was taught them in the light of their experience as well as to get a little more detailed insight into the motives and methods of conference leadership than was possible in their original training conference. Actually it is Step IV in the Normal Thought Process in which the final conclusion is attained. Another way of putting it is that it serves as a Step IV Test, in the teaching-learning process as the practice sessions conducted in the refresher training conference are a much more illuminating and fair test of how well conference leadership has been learned than the practice sessions in the original training conference when the men have just been given their first introduction to conference leadership.

CONTINUING OBSERVATIONS, CHECKS, AND ASSISTANCE VIA NORMAL LINES OF ORGANIZATION

It is surprising how well training of any kind is maintained and kept up to high standards when all levels of supervision have been let in on it. At best, success has sometimes been difficult because higher levels of supervision were not given the same training, or at least an appreciation of it, as was given to lower levels of supervision. As a result, they did not talk the same language and the higher levels of supervision unwittingly counteracted many of the desirable features of the training. Conference leadership training is no different in this respect; unless higher levels of supervision put the same rules into practice and understand and are sympathetic to them, the supervisors reporting to them will not be in a position to make effective use of what they have learned. Furthermore, when a supervisor knows that his boss has been given the same training, he tends to go to him with his problems in conference leadership in the same way that he would go to him in connection with any of his other problems. Only through such observations, checks, and assistance can training be made firm and worth-while. The problem is really no different from that in the productive groups where the working supervisors and the foremen train their men and must, of necessity, know the job in order to do the training and then make the necessary day-to-day observations and give retraining assistance.

Now that we have reviewed, in a brief way, the various steps in setting up conference leadership programs, we are ready to consider in detail the scope, make-up, and content of each of the

four programs. Let us turn our attention first to the full, complete two weeks' training required by the key leaders who train conference leaders to conduct the actual supervisory leadership training programs. Both the key leaders who train the conference leaders and the conference leaders themselves should have the full, two weeks' training wherever possible, although a satisfactory job can sometimes be done by giving the conference leaders who conduct the training of supervisors the same five-day program as is used for levels of supervision above the first line.

TRAINING OF KEY CONFERENCE LEADERS— TWO-WEEK PROGRAM

This program is intended to give an exhaustive, detailed study and analysis of conference leadership methods and techniques and sufficient actual practice in conference leadership to enable key leaders to train other leaders and to provide those leaders with the necessary background to conduct leadership training conferences for supervisory personnel of all levels. Its scope is such that it includes all the methods and motives covered in "Conference Leadership in Business and Industry," for these leaders must have a wide knowledge and perspective which reaches far beyond that required by those whom they will train.

The two weeks' period covered by the training conference is divided between theory and practice in such a manner as to provide approximately three to four days' study of methods with the remaining four to five days devoted to actual practice leadership sessions. The distribution of time between these two phases of conference leadership training will depend largely upon the type of group and its previous background and experience in conference leadership. In cases where experienced conference leaders are being trained as key leaders, a full four days would be spent on methods, theory, and motives. When inexperienced men are receiving their initial training to conduct leadership training conferences, three days are devoted to methods. This permits devoting more time to practice leadership, with the idea that additional training in methods and motives can be given on a follow-up or refresher basis after they have conducted their first few conferences. As is the case in learning any skill, either mental or manual, conference leading can never be successfully taught without provision for actual

practice sessions during which the new leader can try out the methods and principles involved under guidance and receive the help necessary to fitting him for his own unsupervised use of the material.

The only natural means for transmitting conference leadership training to a group is through the conference method itself. It will be necessary for the leader to prepare his own conference outlines, setting up his major objectives and subjects and breaking them down into minor objectives, using the material in the various chapters in this book as background from which to draw his outlines. Since a good portion of the material to be covered is new information upon which most of the group members will be in Zone *C* or at best in Zone *B*, most of the major objectives and their minors will have to be handled on an Informational conference discussion basis. There are a reasonable number which can be handled on a Shaped Developmental basis and it is wise to select a few for Purely Developmental handling. Such a procedure gains the necessary economy of time and does not try to develop items upon which the group has little or no Zone *A* information. By providing Shaped Developmental handling for approximately one-fourth of the major objectives and Purely Developmental handling for a selected few, the leader can use all three specific discussion processes in carrying on the leader training conference. This will enable him to recall various situations and how he handled them and to refer to them during the conference itself as illustrations. It is only natural that quite a few of the major objectives will be given a straight Informational conference discussion process as a result of the material to be handled and the time feature involved.

In a training conference, it is necessary to present the material in an order that will fit a teaching sequence rather than as it is presented in this book. In fact, the presentation of the methods and theory material is interrupted after the fundamental principles have been given in order to provide brief practice sessions for the group members before proceeding to the more involved principles. In addition to enabling the conferees to fix what they have learned of fundamentals by doing, this procedure also breaks up the theory section into two parts and gives variety and added interest to the conference sessions.

Following the round of brief practice sessions, the remainder of the methods and theory material is covered and then the group devotes the rest of its time to practice conference leading sessions supplemented by constructive discussion following each trial. Enough time is provided for each of the group members to conduct two of these practice sessions, one of which should always be a Shaped Developmental discussion, with the other an Informational or Purely Developmental discussion depending upon the aptitudes and needs of the individual conferee.

The conference leader should conduct a brief demonstration conference discussion prior to the practice sessions, since effective teaching requires that the teacher take upon himself the load of showing as well as telling how it is done. Failure to do this violates all the principles of the teaching-learning process.

During the final two rounds of conference leadership practice sessions, adequate use of flow diagrams and checks of quality of discussion should be made in accordance with Chap. XIII. Two practice rounds are used since, during his first trial, the new leader must allow the strain and newness to wear off; in the second round, he will be able to proceed on a more normal basis and to correct any tendency toward wrong practices that he may have displayed during the first practice session.

In order that we may gain a true picture of the rearrangement of the various chapters in this book for training conference use, they have been listed below, with notations as to the points at which the practice leading sessions occur. A sample schedule is provided which organizes the material by days and hours within the two-week period.

TRAINING CONFERENCE SEQUENCE OF CONFERENCE LEADERSHIP MATERIAL

Introduction to conference leadership, its purpose, and its uses.

Chap. I. Conference Leading and Its Everyday Business Applications.

Chap. II. Meetings and Conferences Defined.

Chap. III. The Normal Thought Process and How We Learn.

Chap. IV. The General Conference Process.

Chap. VI. The Basic Types of Discussions and Discussion Operation.

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Chap. V. The Fundamentals of Leadership Technique and Our Involuntary Mental Reactions.

Chap. IX. Questions and Their Use in Conference Leading.
Brief demonstration of conference leading by the leader.

One round of fifteen-minute practice sessions on general subjects applying the General Conference Process. Limited discussion of practice sessions without the use of flow diagrams and quality checks of discussion.

Chap. VII. The Three Specific Conference Discussion Processes.

Chap. VIII. Hints on Handling the Steps in the Conference Process.

Chap. X. Characteristics of Individuals as an Aid to Guiding Conference Discussions.

Chap. XI. Situations and Problems in Conference Leading.

SCHEDULE FOR TWO-WEEK TRAINING First Week

Time	First day	Second day	Third day	Fourth day	Fifth day
9:00 A.M. to 10:30 A.M.	Introduc- tion Chap. I	Chap. VI and discussion	Practice leading and discussion	Chap. VIII and discussion	Chap. XIII and discussion
Recess	Recess	Recess	Recess	Recess	Recess
10:45 A.M. to 12:00 M	Chap. II and discussion	Chap. V and discussion	Practice leading and discussion	Chap. X and discussion	Chap. XIV and discussion
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
1:00 P.M. to 3:00 P.M.	Chap. III and discussion	Chap. IX and discussion	Practice leading and discussion	Chap. XI and discussion	Chap. XVIII and discussion
Recess	Recess	Recess	Recess	Recess	Recess
3:15 P.M. to 5:00 P.M.	Chap. IV and discussion	Demonstra- tion by leader and practice leading	Chap. VII and discussion	Chap. XII and discussion	Demonstra- tion by leader and discussion

Chap. XII. Desirable Traits and Characteristics of a Conference Leader.

Chap. XIII. Discussion Control and Guidance.

Chap. XIV. Conference Discussion Planning.

Chap. XVIII. Some Do's and Don'ts for the Leader.

Demonstration by leader of one of the three specific conference discussion processes.

Two complete rounds of practice leading sessions applying the three specific conference processes. These rounds are supplemented by discussions based upon the flow diagrams and quality of discussion checks.

Chap. XVII. Women and the Conference.

Chap. XV. The Conference Setting.

Chap. XVI. Leader Training Programs in Business and Industry.

PROGRAM IN CONFERENCE LEADERSHIP
Second Week

Time	Sixth day	Seventh day	Eighth day	Ninth day	Tenth day
9:00 A.M. to 10:30 A.M.	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion
Recess	Recess	Recess	Recess	Recess	Recess
10:45 A.M. to 12:00 M.	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Chap. XVII and discussion
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
1:00 P.M. to 3:00 P.M.	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Chap. XV and Chap. XVI
Recess	Recess	Recess	Recess	Recess	Recess
3:15 P.M. to 5:00 P.M.	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Practice leading and discussion	Discussion and conclusion

**FIVE-DAY TRAINING PROGRAM IN CONFERENCE LEADERSHIP
FOR SUPERVISORY LEVELS ABOVE THE FIRST-LINE**

The five-day training program in conference leadership is designed primarily to meet the needs of second-line supervisors and those above that level. It is in these levels that a broader knowledge of the methods and motives of conference leadership is required than is the case for the first-line supervisors and foremen whose training is covered in the three-day program which follows. In the higher levels of supervision, a greater percentage of time is devoted to conducting and participating in day-to-day business conferences than is true of the first-line supervisor who directs the activities of productive employees. Although more knowledge of conference leading techniques is necessary than for the first-line supervisor, this group does not require as detailed a study as the key conference leaders and the leaders who conduct the five-day training conferences.

The five-day program does not include the material in this book intended chiefly for the key leaders and the leaders conducting training conferences. In addition, less emphasis and time are given to certain of the items which are retained. As in the full two weeks' key leader training, the five days are divided between conference discussions of the methods and theory and actual practice leading sessions. The actual practice leading sessions are just as vital as in the training of key leaders; as the time devoted to the study of methods and motives is reduced, the importance of actual firsthand practice rises. This is a natural result of the added need for learning through doing where conference leadership is used as a working tool by a supervisor, superintendent, or executive rather than as a training device. What sells the average supervisor on the value of conference leadership is the actual demonstration of its practical use combined with the feel of doing it and the sense of achievement that goes with it. No business is conducted purely for the purpose of holding conferences. The real value of the study and application of conference leadership principles lies only in its ability to contribute to the economical, effective conduct of the business. It must show results in terms of time, effort, and money. As in the two weeks' training program, the theory and methods section of the five-day program should be handled on a conference basis

with the Informational conference discussion predominating. A fair proportion of the discussion will again be Shaped Developmental and some of the major objectives should be handled by the Purely Developmental process. It is important that the handling given the various major objectives be consistent with the principles of conference technique that we have built up.

Again we must not neglect the fundamental principle of putting what we have learned into actual practice as soon as sufficient knowledge of the rules has been attained. Therefore, in the five-day program provision is made for a round of fifteen- or twenty-minute practice leading sessions following the completion of the General Conference Process and the material which precedes it. It is just as important as before that the leader give a brief demonstration prior to the start of the practice sessions.

Following the brief practice sessions, which make no mention of the specific conference processes but apply only the General Conference Process, the remainder of the methods and theory material is completed. The rest of the time in the five-day program is devoted to practice leadership sessions followed by discussions. In these practice rounds the specific conference processes are used. The training-conference leader makes only such use of the flow diagrams and quality checks of discussion as is necessary to provide for effective treatment of the practice sessions. In the five-day program, there may not always be time enough for all twelve members of the group to complete two practice leading sessions using the specific conference discussion processes. As a result, the leader must reserve such second turns as are available for those members of the group who show the least aptitude or the highest degree of perturbation.

Approximately one and a half to two days' time is devoted to the methods and theory section of the five-day conference leadership training, with the remaining three to three and a half days being used for the brief practice sessions and the final rounds of conference leadership trials. As has been outlined above, the conference leading methods material and the practice leading sessions are interwoven in the following manner:

1. Preliminary treatment of conference leadership methods and theory.

2. Brief demonstration by the leader using the General Conference Process.

3. One round of brief (fifteen to twenty minutes) practice leading sessions based on fundamental methods and the General Conference Process.

4. Completion of conference discussions of methods and theory.

5. Final conference leading practice sessions using the specific conference discussion processes.

6. Conference conclusion.

TRAINING CONFERENCE SEQUENCE OF CONFERENCE LEADERSHIP MATERIAL

Introduction to conference leadership training program.

Chap. I. Conference Leading and its Everyday Business Applications.

Chap. II. Meetings and Conferences Defined.

Chap. III. The Normal Thought Process and How We Learn.

Chap. IV. The General Conference Process.

Chap. VI. The Basic Types of Discussions and Discussion Operation.

Chap. V. The Fundamentals of Leadership Technique and Our Involuntary Mental Reactions.

Chap. IX. Questions and Their Use in Conference Leading.
Brief demonstration of conference leading by the leader.

One round of fifteen-minute practice sessions using the General Conference Process.

Chap. VII. The Three Specific Conference Discussion Processes.

Chap. VIII. Hints on Handling the Steps in the Conference Process.

Chap. X. Characteristics of Individuals As an Aid to Guiding Conference Discussions (selected items only).

Chap. XI. Situations and Problems in Conference Leading (selected items only).

Chap. XII. Desirable Traits and Characteristics of a Conference Leader (selected items only).

Chap. XVIII. Some Do's and Don'ts for the Leader.

Chap. XIII. Discussion Control and Guidance (appreciation only).

Chap. XIV. Conference Discussion Planning (selected items only).

Demonstration of Shaped Developmental discussion process by leader.

Practice rounds of leadership using specific conference discussion methods.

Conclusion including Women and the Conference and brief remarks relative to conference settings.

SCHEDULE FOR FIVE-DAY TRAINING PROGRAM IN CONFERENCE LEADERSHIP

Time	First day	Second day	Third day	Fourth day	Fifth day
9:00 A.M. to 10:30 A.M.	Introduction Chap. I Chap. II	Practice leading	Chap. X Chap. XI	Practice leading and discussion	Practice leading and discussion
Recess	Recess	Recess	Recess	Recess	Recess
10:45 A.M. to 12:00 M.	Chap. III Chap. IV	Practice leading	Chap. XII Chap. XVIII	Practice leading and discussion	Practice leading and discussion
Lunch	Lunch	Lunch	Lunch	Lunch	Lunch
1:00 P.M. to 3:00 P.M.	Chap. VI Chap. V	Practice leading	Demonstration by leader Appreciation of Chaps. XIII and XIV	Practice leading and discussion	Practice leading and discussion
Recess	Recess	Recess	Recess	Recess	Recess
3:15 P.M. to 5:00 P.M.	Chap. IX Demonstration by leader	Chap. VII Chap. VIII	Practice leading and discussion	Practice leading and discussion	Conclusion

**THREE-DAY TRAINING PROGRAM IN CONFERENCE LEADERSHIP
FOR FIRST-LINE SUPERVISORS AND FOREMEN**

First-line supervisors and foremen whose primary responsibility is directing the work of productive employees, do not, as a general rule, require the five-day program as their initial

training when they are concerned in construction, shop, or craft types of activities. Neither do they need nor are they sympathetic toward a detailed study of methods and motives in conference leadership for they are much more fitted by nature and training for the "doing" phases of conference leadership on a practical day-to-day basis. The three-day conference leadership training program for first-line supervisors and foremen is much more restricted in its treatment of methods and theory than either of the other two programs. It reduces the methods and theory section of the training conference to those fundamentals which can be readily applied and do not involve the more complex techniques. In the initial three-day program, the three specific discussion processes are not covered as such and the leadership procedure is built around the General Conference Process, using the overhead and closely shaped types of operation together with such essential features as the use of questions and the more pertinent ideas relating to the characteristics of individuals, conference situations, and the desirable traits of a conference leader. The General Conference Process can, if desired, be amplified to include the Shaped Developmental and the Informational discussions as simple variations rather than as separate processes. In many cases this is not necessary nor even desirable since a knowledge of the General Conference Process when given a closely shaped method of operation is sufficient for practical use by most first-line supervisors and foremen engaged in direct manual production.

As we have noted, the over-all program of conference leadership training provides for field follow-ups after some experience has been gained in actual use of the principles and methods; refresher training conferences should be given after a period of approximately three to six months. It is in the refresher training conference, which takes place after the first-line supervisor and foreman has had time to get his feet on the ground and orient his ideas, that the General Conference Process can be expanded to include the three specific discussion processes and a more extensive treatment of the conference techniques themselves.

The three days are, as in previous cases, divided between conference discussion of methods and motives and actual practice leading sessions. In the three-day training conference, the total time devoted to methods does not exceed one day, with the

remaining two days being given over to actual practice in leading. Care should be taken to avoid the use of complex subjects for discussion in the practice leading sessions in the three-day program. Simple subjects will suffice and the use of the General Conference Process on a Shaped Developmental basis is most effective. It is most important that the leader demonstrate the conference process before the start of the first brief trial rounds of practice leading.

Because of the limited time available, the brief fifteen-minute trial leading sessions are not participated in by all the group; the leader selects three group members whose poise and manner warrant it and has them conduct brief trial leading sessions. All the group members do have an opportunity for at least one practice leading session following the completion of the methods material.

The arrangement and selection of the chapters and material used in the three-day program are somewhat different from the previous two cases. A list showing the selected chapters and indicating the extent of their use when arranged in teaching sequence is shown below, together with notations as to the leader's demonstrations and the practice leading sessions.

TRAINING CONFERENCE SEQUENCE OF CONFERENCE LEADERSHIP MATERIAL

Introduction to conference leadership.

Chap. II. Meetings and Conferences Defined.

Chap. III. The Normal Thought Process and How We Learn, excluding a detailed treatment of methods of reasoning and comparisons with the teaching-learning process.

Chap. IV. The General Conference Process.

Chap. V. The Fundamentals of Leadership Technique and Our Involuntary Mental Reactions, emphasizing zones of knowledge and excluding more involved considerations.

Chap. VI. The Basic Types of Discussions and Discussion Operation.

Brief demonstration of discussion by leader.

Trial leading of fifteen-minute discussions by three selected group members.

Chap. IX. Questions and Their Use in Conference Leading, emphasizing more practical aspects.

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Chap. X. Characteristics of Individuals as an Aid to Guiding Conference Discussions, appreciation only.

Chap. XI. Situations and Problems in Conference Leading, appreciation only.

Chap. XII. Desirable Traits and Characteristics of a Conference Leader, appreciation only.

Chap. XVIII. Some Do's and Don'ts for the Leader.

Demonstration of conference leadership by leader.

One round of practice leading sessions by all group members using simple subjects.

Conclusion, including brief discussion of conference settings.

SCHEDULE FOR THREE-DAY TRAINING PROGRAM IN CONFERENCE LEADERSHIP

Time	First day	Second day	Third day
9:00 A.M. to 10:30 A.M.	Introduction Chap. II Chap. III	Chap. IX Chap. XI	Practice leading and discussion
Recess	Recess	Recess	Recess
10:45 A.M. to 12:00 M.	Chap. IV and discussion	Chap. XII Chap. XVIII	Practice leading and discussion
Lunch	Lunch	Lunch	Lunch
1:00 P.M. to 3:00 P.M.	Chap. V and Chap. VI	Demonstration by leader and practice leading	Practice leading and discussion
Recess	Recess	Recess	Recess
3:15 P.M. to 5:00 P.M.	Demonstration by leader. Three trials by group members	Practice leading and discussion	Discussion and conclusion

BRIEF "COOK'S TOUR" PROGRAM NOT DESIGNED TO EQUIP FOR CONFERENCE LEADERSHIP

The "Cook's tour," three- to four-hour appreciation of conference leading is intended to provide executives and others with a knowledge of what conference leadership does and how it does it rather than an insight into the detailed techniques. It is

useful in selling those in authority the need for conference leadership training as well as equipping executives with sufficient knowledge of conference leadership to enable them to cooperate with supervisors in lower levels of the organization who are putting the principles into practice. This brief appreciation also tends to make better conferees of individuals who have had it.

The limited time available makes it impossible to consider any of the techniques or procedures in detail and requires a descriptive approach. It should outline the advantages of a study of conference leadership and its applications in day-to-day business conferences, showing what it saves in time, effort, and money and what it contributes to better relationships within the organization. Each leader who gives such an appreciation of conference leadership must adjust the material he uses in the light of the policies and viewpoints of the particular business or industrial group to which it is to be given.

The "Cook's tour" appreciation should be handled on an Informational basis with the leader "putting out" and then providing for group discussion. In addition, it is highly desirable that a brief demonstration of the conference procedure be given, using the group as conferees, or that a visual aid such as a sound slide film which depicts conference procedure be secured and run. Actual demonstration of some of the major principles involved provides the "doing" feature that is helpful to acceptance. The decision as to whether a brief demonstration conference of a Shaped Developmental nature is desirable must rest with the leader and his knowledge of the executive group, their reactions, and the time available.

SUGGESTED MATERIAL FOR "COOK'S TOUR" APPRECIATION

Chap. I. Conference Leading and Its Everyday Business Applications.

Chap. II. Meetings and Conferences Defined, excluding detailed summaries of relationships.

Pertinent material as to the Normal Thought Process, the General Conference Process, and the three specific conference processes and their applications.

Brief résumé of discussion operation and questions and their use in conference leading.

How conference leadership can be used to advantage in the particular business or industry concerned.

Discussion by group members.

Actual demonstration of conference leadership or the use of a visual aid.

Brief discussion.

Suggested program for conference leadership training.

SELECTION AND ASSIGNMENT OF SUBJECTS FOR PRACTICE LEADING SESSIONS

The selection and assignment of subjects (major objectives) for practice leading sessions is very important. In the fifteen-minute initial sessions, they should be relatively simple and adaptable to Shaped Developmental handling, since there has been no previous preparation by the group members. Obviously, when no preparation time has been allowed, the discussion will have to be of a Purely Developmental or a Shaped Developmental type and chosen carefully so that the group will have a reasonable number of Zone A members with respect to that subject. Otherwise, the embryo leader would be faced with the more difficult problem of no Zone A information very early in his experience before he had been taught how to handle it.

The subjects for the practice leading rounds which follow the completion of the conference discussion on methods, motives, and theory should be assigned in advance to permit planning of them. There are many sources of such subjects but, when available, one of the most satisfactory is the supervisory training material used by the business or industry in question. It is wise in the practice rounds to use practical subjects relating to the business or its supervision whenever possible, although subjects of general interest with a slight controversial tinge add interest and variety.

It is the most stimulating procedure to have the leaders conducting the training programs prepare their own conference outlines. However, in the interests of uniformity of handling, many large organizations prepare the basic outlines for the leader. Even with prepared outlines, the leader must still do his own planning. He must adjust these outlines to his own personal methods of operation for, unless they are personalized, much of the spontaneity and naturalness of his presentation

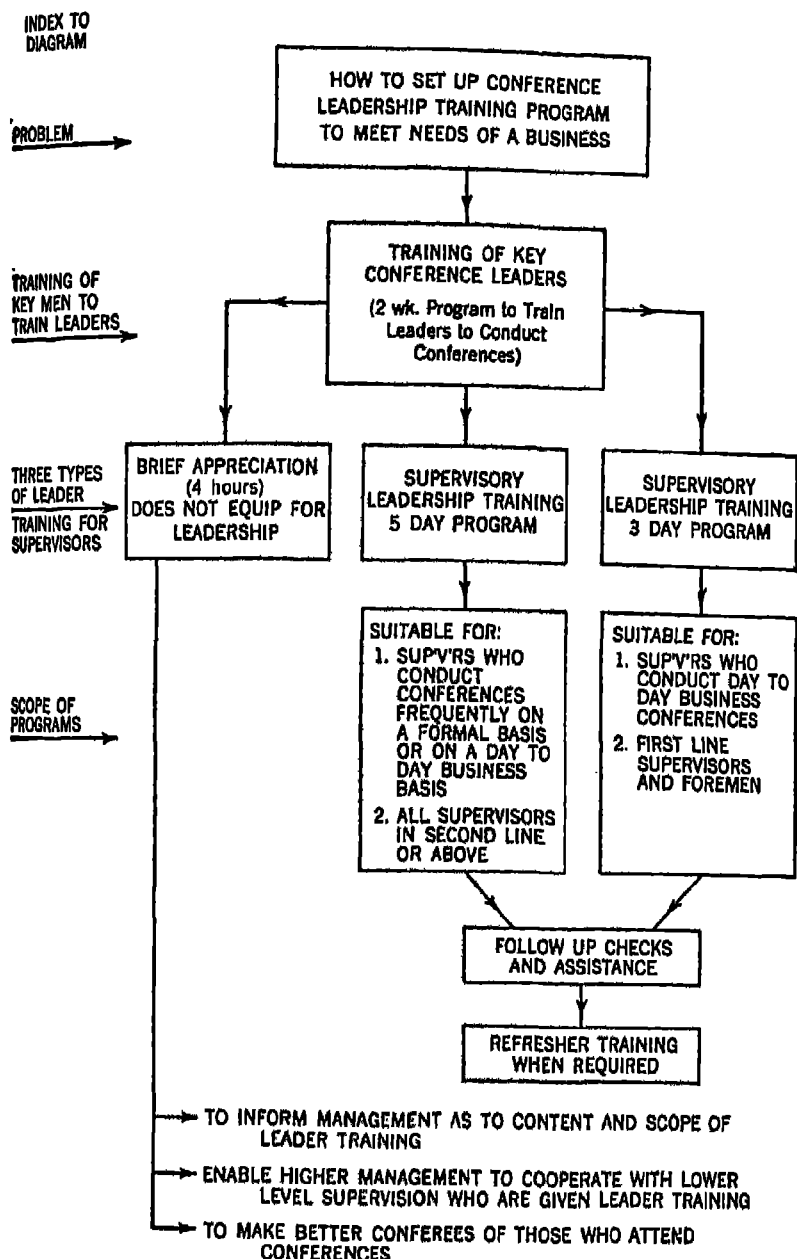


Fig. 31.—Flow diagram summarising Chap. XVI.

will be lost. The type of leader's outline most generally supplied is topical in form and similar to those following Chap. XIV. Great care must be taken if personalized outlines of other leaders are used, as the shades of meanings of words and the relationships between the ideas will not always be evident. In general, their use by other than the one who prepared them should be avoided.

CHAPTER XVII

WOMEN AND THE CONFERENCE

CONFERENCE GROUPS CONTAINING WOMEN

Leadership training conferences seldom are completed without some of the group members raising the question of whether the principles, methods, and techniques discussed apply to women as well as men. Although the general principles and practices are the same, the natural and inherent involuntary reactions of men and women may be somewhat different under the influence of the same stimuli. These differences in response may possibly, under unfavorable conditions, give rise to difficulties. Our study of leadership would be incomplete if we did not review and consider these possible differences in reactions and adjust our leadership techniques accordingly. It must be borne in mind, however, that in our consideration we shall be looking in detail at factors that might affect our leadership techniques; as a result, we might place undue emphasis upon them unless they are properly fitted into the over-all picture of conference leading.

Even before the war, women as supervisors in business and industry were no longer unusual and were taking their place along with men as competent, thoroughgoing supervisors and, in some instances, executives and officials. As a necessary and natural part of the fulfillment of their responsibilities, participation in day-to-day business conferences as conferees and as conference leaders was accepted without question. For the most part, very few of the problems and difficulties that had been anticipated as a result of this new and untried relationship actually materialized. However, there may have been tendencies to attribute special significance to the actions and reactions of women conferees even though they followed the same general pattern often evidenced by newly appointed male supervisors. There was undoubtedly some factual basis for the differences noted, because of the inherent difference in women's background and approaches to reasoning.

**NORMAL THOUGHT AND TEACHING-LEARNING PROCESSES
AND WOMEN**

Early in our consideration of the fundamental principles of how we think and learn, the Normal Thought Process and the teaching-learning process were discussed in some detail. Nowhere was there any indication that they applied solely to men; in fact, they deal with fundamental human characteristics and apply with equal force to both men and women. If such were not the case, our everyday relationships would indeed be a complex and nerve-racking experience.

Although the fundamental processes are the same for both men and women, we must not overlook the differences in background, experience, and emotional and even spiritual objectives which have resulted from the centuries upon centuries during which there has been a distinct difference in women's status. Our responses to stimuli are, of necessity, conditioned by those things which spring from both heredity and environment. In our study of the adjustment of conference leadership techniques so as to reflect both the male and female manifestations of the fundamental human processes, we must keep in mind that there is no real line of cleavage based solely upon sex. The range of reactions found in both males and females as individual groups does not vary much from the range of the differences between men and women as separate and distinct groups. There are, of course, men whose viewpoints and approaches to reasoning are somewhat similar to those of the average woman while, on the other hand, there are women whose mental reactions and reasoning processes have the majority of the characteristics ascribed to men. It is one of nature's laws that the extremes of a single type often vary more than the differences between two types of the same species. Therefore, with the exception of a few specific characteristics, we shall find that the problem of differences is not as great as is often supposed.

**POSSIBLE VARIATIONS IN THE INVOLUNTARY USE
OF REASONING PROCESSES BY MEN AND WOMEN**

The two general methods of reasoning, deductive and inductive, were discussed in Chap. III as a part of the background of individual and group reasoning necessary to an understanding

of conference leadership. As will be recalled, the Normal Thought Process is a general procedure that can be applied in two different ways, depending upon which method of reasoning is used. Deductive reasoning consists of deriving a conclusion from facts by analyzing and evaluating them so as to eliminate all inferences which cannot be proved or demonstrated to be true. Inductive reasoning takes a set of facts, analyzes them, classifies and compares them, and then, through inference as to what may be assumed to be true because of what has already been proved, arrives at a conclusion based on known facts plus inference.

Men as a group have more tendency to reason on a purely factual basis than do women. Deductive reasoning is a more instinctive outlet for them. Women, on the other hand, tend to reason more often on a basis of their feelings or emotions. Consequently, it is only natural that the mixture of facts and feelings which results leads to an inductive rather than a deductive application of the Normal Thought Process. When the inductive reasoning process is used, the conclusion arrived at is made up of both facts and inference. The logic of the inductive reasoning procedure is a direct function of the type of inferences supplied. Where the inferences that are combined with the facts are introduced on an instinctive or intuitive basis, the conclusion reached does not directly reflect a step-by-step procedure or development. It is this that has often caused men to observe that some women do not reason, only to be surprised in those instances where a sound conclusion is reached. There is no difference in the fundamental process used but there is a wide and sometimes unexplainable variation in the proportion of facts and inferences entering into the reasoning process.

The average woman who has been successful in achieving a supervisory position in an organization in which men predominate has, of necessity, manifested an ability to control her reasoning insofar as it applies to job procedures. It is only natural that there will be at times evidences of an unconditioned response based upon natural reactions. However, if a conference leader keeps in mind the inherent differences in reasoning tendencies, he will be alert to the need for carefully evaluating contributions to the discussion and conduct his shaping and guiding of the conference accordingly. It is often wise to use tactfully reverse

questions of a provocative type to permit the proper clarification of the contribution. This tends to offset the inclination to pass over or rule out a seemingly poorly related contribution which may later be found to have a reasonable relationship to the discussion.

Unless care is taken to give fair consideration to their contributions, there is more danger of inspiring inferiority in women conferees, particularly where women are in the minority in the group. The leader should be sure to see that the male members of the group do not unconsciously and unintentionally inspire a feeling of inferiority in women conferees by offhand, depreciatory treatment of their contributions to the discussion. On the other hand, the great majority of women expect and desire only an equality of treatment in their business relationships and rightfully resent concessions made to them on a purely feminine basis. This is wholly consistent with the principles of sound conduct of business and, as a consequence, sound procedure in conference leadership.

FACTORS IN THE ADJUSTMENT OF LEADERSHIP TECHNIQUES AND INVOLUNTARY MENTAL REACTIONS

The two fundamental human urges are basic to the involuntary mental reactions of women as well as men even though the relationship between them and their manifestations varies to some degree with the sexes. In adjusting our leadership technique to meet the requirements of women conferees, we need not change the basic considerations with respect to the two human urges nor the zones of knowledge that were discussed and evaluated in Chap. V. All the various rules and methods that we set up still hold; however, it will be worth while to consider the differences in emphasis and reactions that may occur.

While men, as a rule, do not tend toward introducing personalities into their consideration of purely business matters, women may take an altogether different approach. A strongly defended difference in viewpoint, opinion, or actions about a particular business issue seldom results in personal enmity between the men involved. Although the discussion may have waxed hot and furious, it remained on an impersonal basis and the friendship or personal relations between the men involved seldom

change as a result of it. However, with women, there is a natural tendency to interpret things that directly concern them on a personal basis. Incidents as well as discussions may be instinctively evaluated from the standpoint of the personalities concerned rather than impersonally. This indicates the high degree to which the "I want to be" urge enters into women's actions and reactions, for remarks and statements that would generally pass unnoticed among men may appear to carry personal inferences.

The hypothetical third-person approach is often the best one to use in discussions including women conferees when they are directly concerned. The leader should be careful to avoid the use of actual cases as illustrations during a discussion if it may be interpreted as putting them on the spot. The hypothetical third-person treatment of a subject is a face-saving procedure which is often resorted to even when all the conferees are men since it avoids arousing prejudices. In fact, it is best to err on the side of providing more than is necessary rather than to give unwarranted embarrassment regardless of whether it is actual or inferred. In our previous discussion of involuntary mental reactions, we laid some stress upon the natural variations in the emotional stability of human beings. With some individuals, the number of days between their emotional low points that are independent of job surroundings and circumstances is greater than with others. This is also true of the range between the heights and depths of their feelings. A leader must keep in mind the more pronounced day-to-day variation in the stability of women conferees. The same pattern of reactions will not always persist essentially unchanged from day to day. Thus a leader may find that, when a conference continues the next morning, what appeared to have been completely settled and accepted just prior to closing the previous evening is now wholly unacceptable. As a rule this does not represent a fixed change in viewpoint but merely the need for recalling and briefly reviewing the essential factors upon which the previous acceptance was based before proceeding. A Shaped Developmental discussion redefining the last conclusion reached in the previous day's discussion seems to be the most effective way of overcoming the reappearance of what might be termed the inferences and assumptions that had been shaped out of the preceding discussions.

**POSSIBLE VARIATIONS IN HANDLING THE STEPS
IN THE GENERAL CONFERENCE PROCESS**

All the rules and suggested procedures for handling the five steps in the General Conference Process as well as the use of the three specific conference discussion processes are valid regardless of whether there are women conferees in the group. Most of the possible variations suggested for the leader's use when there are women in the group originate from the occasional need for greater definition of unfamiliar terms and the possibility of a lack of knowledge of technicalities and detailed work procedures. There are a few additional steps that can be taken by the leader to provide a better adjusted handling procedure should it become necessary.

Among the six things that we specified in Chap. VIII which should be achieved by a good Step I, Approach, are two that are of special importance from the standpoint of women conferees. These are

2. Define the purpose of conference discussion or meeting.

6. Clarify the meaning of any ambiguous words used in the statement of the major objective of the discussion.

The leader should be sure that Step I is not too short for complete clarification of all terms and ideas which must be defined to be understood. He should keep in mind the possibility that women conferees' background of knowledge and experience in the more technical phases of the business may be limited. He should be particularly careful to make sure that the understanding of women conferees is checked but he should do this without making it noticeable or separating them from the rest of the group. Failure to extend general participation in Step I sufficiently to permit the gaining of thorough understanding of the major objective to be discussed as well as the clarification of any ambiguous words in the minds of women conferees may limit the participation or cause them to give an unwarranted impression of lack of perception.

In Step II, as in Step I of the General Conference Process, it is merely a matter of placing added emphasis on certain of its features rather than making a fundamental change in them. It was agreed that there should be sufficient discussion to provide the necessary drawing out to achieve shifts in zones of knowledge.

Care must be taken that the women conferees participate sufficiently to ensure the shifts in zones of knowledge necessary for acceptance. In addition, the leader should not fail to introduce Zone A information into the discussion when it is required and to see that it is properly clarified. With women conferees he must expect to stop and clarify more often in Step II if he is to have a satisfactory discussion; moreover, he must be constantly on the alert to sense the need for it.

Step III, Acceptance, welds the minor objectives into a coherent group acceptance which is verified through making such individual checks of acceptance as may be indicated. As will be recalled, our general rule is to check only those group members requiring it and not those whose acceptance is plainly evident as a result of recently stated convictions. It is wise to modify this general rule to some extent and to make specific checks of the individual acceptance of women conferees whenever there is the slightest necessity for it. Again, this procedure should be carefully woven into an extended check of the individuals in the group as a whole. Occasionally the discussion may slip back into Step II after Step III has been started. Whenever there is the least doubt as to individual acceptance, the leader should seek a positive statement of viewpoints and not proceed on the basis of an inferred acceptance.

A complete and satisfactory summation in Step IV never neglects stating and writing the conclusion reached upon the board and spot checking acceptance of it as worded. In addition, summation should never be made before the group is ready for it. If acceptance is properly determined as discussed above, there should be little difficulty in achieving a good Step IV. It may be desirable with women conferees to redefine and check understanding of the terms used in the conclusion statement if there is any variation in shades of meaning or in the words used.

Step V, Association, being a function of the leader, gives him an opportunity to sow seeds which he can use in Step I of his next discussion provided there is a relation between the two subjects. The opportunity to bring in some Zone A information that will be of value to women conferees in the next discussion should not be overlooked. However, it must be kept within the bounds of reason in order not to unbalance and distort the main objective of Step V, which is to tie in properly the major objective with

the over-all meeting and the other objectives as well as the company's policies. It is quite important that Step V not be overlooked in handling the minor objectives, as is sometimes the case when it is mostly a transition step. Additional emphasis on Step V, transition between minor objectives, provides the leader with an excellent opportunity to make the gaining of understanding and acceptance a smooth, consistent process for women conferees who may have a limited background.

From what has been said it should be more evident than ever that the presence of women conferees does not change the fundamental handling of the five steps in the General Conference Process in any way. It merely calls for the adjustment of the leader's technique to meet the requirements of individual conferees; this is at all times one of his chief responsibilities, regardless of the make-up of the group. If the conference group is a mixed one, his added duty consists chiefly of maintaining an alert awareness of the possible need for making more extensive adjustments.

THE LEADER'S ATTITUDE

Our discussion of the desirable traits and characteristics of a conference leader in Chap. XII was most definite with respect to the effect of the leader's attitude upon the group discussion. The importance of liking and enjoying working with people cannot be underestimated, for otherwise the leader will create many of his own problems. This same principle applies where women are included in a discussion group. Since the problem is in no way different from that which confronts us in our daily lives, it should not be alarming and should be viewed with the same anticipation of a pleasing and satisfactory experience as is the case in our general relationships. If the leader takes the same sincere, open-minded approach into his conference leadership, he will have at once surmounted the majority of his anticipated difficulties since most of them will never exist other than in his own imagination. This does not mean that the leader should neglect the possibility that a somewhat specialized handling may become necessary from time to time because of the differences in background and training acquired by men and women. His successful, sympathetic, and understanding variations of the general rules so as to meet the requirements of women

conferrees will depend largely upon his own attitude and approach to the problem.

THE GROUP ADVANTAGES OF WOMEN CONFEREES

Once the minor variations in leadership techniques required to adjust them to the needs of women conferrees are understood, the leader can profit by some of the advantages that may result from their presence in a group. Women, as a general rule, have a more natural and freely expressed tendency toward exploratory discussion than do men. Given an opportunity for expression based upon an understanding of the subject, their reasoning approach will often result in the introduction of new angles into the discussion. Properly handled, this makes for a more interesting and exhaustive discussion by developing the possible variations which may be considered. Since the competitive urge is generally much less marked in women than in men, their uninhibited responses do not have the same cover-up qualities so often evidenced by men.

Another desirable by-product of the presence of women conferrees lies in the restriction it places upon the tendency of the day-to-day business conference occasionally to wander astray. Once the initial adjustment of the group to the presence of women conferrees has been made, their participation under the guidance of an understanding leader may be advantageous to the group.

SUGGESTIONS FOR THE WOMAN CONFERENCE LEADER

Now that we have considered the woman conferee from the standpoint of the male conference leader, we must reverse the procedure and consider the woman conference leader conducting a discussion group made up of men. When both sides of the question are considered, we soon find that our previous conclusion that there is no far-reaching fundamental difference in the basic thought process and reasoning methods is still valid. The General Conference Process and the specific conference discussion processes are wholly valid in all cases; however, their use and handling must be adjusted to meet the needs of the particular group and the individual conferrees in that group.

There are no specific rules that will apply in all cases and for all groups. However, in the majority of groups, once the woman

conference leader has demonstrated her ability to conduct a satisfactory conference, the group will not again question her ability to guide the discussion. In fact, her own attitude and approach to the problem when she starts the discussion will do much to convey a definite impression that she knows her business. As has been pointed out previously, self-confidence comes chiefly from a knowledge of the techniques of conference leadership and how to use them. In the case of a woman leader, it is even more desirable that she have the opportunity to conduct practice leading sessions prior to undertaking actual conference work. The woman leader must be alert to the possibility of misunderstandings arising as to her effectiveness and competency as a leader. The remainder of this section will be devoted to several factors she should consider in maintaining her status as a capable leader.

The first general rule that the woman conference leader must keep in mind is the converse of that for the male conference leader with women conferees in his group. She must at all times be aware of the male tendency for factual reasoning and should make reasonable attempts to adjust her own reasoning and leadership techniques with it in view. However, she should not make the mistake of veering so far in that direction as to destroy the naturalness of her leadership, because artificiality is dangerous to good leadership. She should merely try to avoid reasoning on an inductive basis when it is not required or supplying inferences and assumptions on a purely intuitive basis. This is not only good policy from the standpoint of tact but is also good practical psychology for, as we have found, it is best to present material in such a manner that it will tie into the background of the group. The very nature of conference work is in the favor of the woman leader when conducting a male group since it is built around group discussion, with the group in most instances supplying as much of the information as possible. The leader must have sufficient knowledge and background to evaluate properly whether what is contributed is directly, closely, or slightly related, or unrelated to the subject under discussion.

Thus we see that the woman conference leader must, as a safeguard, spend such extra time as is necessary on her preparation, particularly as it concerns items of a technical nature upon which her background may be somewhat limited. Except in the

case of the Informational type of discussion, a detailed technical background is not necessary; a general knowledge will usually suffice for conducting the discussion provided sufficient preparation is made to permit correct evaluation. In addition, the very nature of group discussion permits the use of the group and authorities in the group to good advantage in the Shaped Developmental and the Purely Developmental discussion processes. In the Informational discussion process, it is usually good practice for the leader to be an accepted authority on the matter most pertinent to the discussion. This is not absolutely necessary, however, and an Informational discussion can be held in which the group members are the authorities although it may present additional problems from the standpoint of leadership.

Regardless of the specific type of conference discussion used, it is good leadership for a woman leader to make maximum use of any men authorities in the group. It is good basic psychology as well, since it gives some play to the "I want to be" urge in addition to the "I want" urge in cases where there is a direct relation to the individual's job. Careful consideration and care should be given to the selection of the basic conference discussion processes for the over-all discussion of the major objective in addition to that accorded each of the minor objectives. Whenever an Informational discussion process is indicated for a minor or major objective, the woman leader will find that it pays big dividends to conduct the discussion so that it has a definite Shaped Developmental handling wherever possible and the group feels that it has developed the conclusion itself. This is quite readily done since the leader need only depart from Shaped Developmental handling when it is not possible to get the information from someone in the group. Even in such cases, with skillful handling, the leader can inspire group members to request the contribution of information and the group will not lose its sense of control. As can be readily inferred, the woman leader will find it wise to use closely shaped handling as much as is possible, permitting only a sufficient degree of overhead discussion to give the group a sense and feeling of control.

Step I, Approach, is of vital importance to the woman leader for she must be certain that the problem is clearly defined in the minds of the group before Step II is undertaken. This will eliminate any tendency for the group to ascribe to the leader's

handling a feeling of uncertainty as to what they are discussing. The group gets its first impressions of the leader's skill in conducting the discussion during Step I, and a clean-cut, well-handled Step I that outlines and sets up the limits of the discussion as well as clarifies any ambiguous terms cannot fail to convince the group of the leader's ability.

The checking of group acceptance in Step III should be accomplished as tactfully as possible. It is good practice for the leader to use those within the group who have shown their acceptance and understanding of the conclusion to answer any questions that may arise. The woman leader will find it particularly desirable to avoid giving the appearance of forcing group acceptance.

In Step IV, Summation, the use of logical, clear-thinking group members to phrase and word conclusions which have any highly technical aspects whatsoever finds great favor among women conference leaders. In the Shaped Developmental and the Informational specific discussion conference processes, the woman leader should not relinquish the phrasing of the summation conclusion whenever her background is such that she feels able to accomplish it without leaving her open to question by possible sharpshooters. In fact, in her handling of the discussion, she should not defer to male authorities except where good common sense and judgment indicate that there is an advantage to be gained by so doing.

The possibility of inspired inferiority is just as much a problem for the woman leader as for the male leader with women conferees in his group. In many ways male groups may be even more susceptible to it with a woman leader than when the reverse is true. This arises in some respects from the comparatively recent advent of women into the supervisory phases of business and industry. As was true in the reverse situation, the woman leader will find that the hypothetical third-person approach may be required as well as the use of face-saving outs.

In one respect at least, the scales are balanced in favor of the woman leader for it is most unusual that a male group will not have a cooperative attitude toward the woman leader once she has clearly demonstrated her ability to conduct conferences skillfully and effectively. There will, of course, be individuals of the die-hard type who will require some special attention

along the lines that we have discussed in the chapters on situations and problems and on the individual characteristics of group members. These principles will be found to meet the woman leader's needs with very little adjustment.

SUMMARY

The presence of women conferees in no way constitutes a major problem since it does not change in the least any of the fundamental rules and techniques of conference leadership. Occasionally the leader must change the emphasis in conducting a discussion but the variations are no greater in extent than many of those normally required in groups composed entirely of men. The difference lies mainly in the approach to the use and the stress laid upon the particular variations that may be required.

Many times we forget that women whose abilities have resulted in their achieving supervisory or executive positions have automatically conditioned themselves through their extended background of daily contact with men in business. For the greater part they are more successful in adapting themselves to the male viewpoint than many men are in achieving a similar adjustment. A little observation will often show that a complete metamorphosis takes place within a surprisingly short time each morning when a woman supervisor or executive enters upon her daily work. For the most part, there is only an occasional variation from this conditioned viewpoint during the course of a conference; when properly handled by an understanding conference leader, such instances can usually be shaped to the advantage of the group as a whole.

The fact that we have dealt with some of these variations in detail should in no way be construed as magnifying their importance or significance. This is only one phase of conference leadership; discussion of its details might give the impression of magnifying its importance if it is not properly integrated into its position as it relates to the over-all problem.

To summarize the essential points of what we have discussed regarding the woman conferee, the general items which should be considered are listed below:

1. Women have more tendency toward reasoning on a feeling or emotional basis than men do. As a general rule, men reason on a factual rather than a feeling basis.

2. The possibility of inspired inferiority may be greater with women than with men.

3. Women often tend to interpret things directly concerning them on a personal rather than an impersonal basis.

4. The hypothetical third-person approach to specific problems is highly suited to women conferees.

5. A leader must keep in mind the more pronounced day-to-day variation in the stability of women conferees.

6. A face-saving out should be provided whenever there is any possibility of its being needed.

7. The highly essential clarification of terms and ideas should be provided, since they must be defined within the limits of the conferee's background and experience.

8. The problem should be approached with a sense of understanding, liking for it, and a conviction that it can be used to the mutual advantage of all of the group members.

9. Women leaders must keep in mind the male tendency toward factual rather than intuitive reasoning.

10. Special preparation on technical subjects pays dividends for woman leaders.

We must remember that the limited amount of adjustment of our methods resulting from the presence of women conferees is no different than would be the case if the situations were reversed. If women had predominated in business for many years, the introduction of men into conference groups would call for the same consideration as does the presence of women conferees. In fact, if the average man found it necessary to participate in many women's activities, he would soon realize that the nature of the adjustment required is determined mainly by the group majority.

TRUE-FALSE QUIZ

	True	False
1. The natural, inherent reactions of men and women may be different under the influence of the same stimuli.	—	—
2. The fundamental human characteristics apply with equal force to both men and women.	—	—
3. It is a natural law that extremes of a single type often vary more than the differences between two types of the same species.	—	—

	True	False
4. Men tend to reason on a basis of their feelings and emotions more than women.	_____	_____
5. Factual reasoning predominates among women.	_____	_____
6. Inductive reasoning based on inferences of an intuitive nature does not reflect a step-by-step procedure.	_____	_____
7. The average woman supervisor or executive has often achieved a factual reasoning ability in relation to job procedures.	_____	_____
8. Women in business generally do not desire just an equality of treatment with men but want concessions made to them because of their femininity.	_____	_____
9. There is no need to change the basic considerations with respect to the two fundamental human urges when women conferees are in the group.	_____	_____
10. Women tend to interpret things that directly concern them on a basis of personal relationship more often than men.	_____	_____
11. The hypothetical third-person approach is not suited for use when there are women conferees in the group.	_____	_____
12. With women conferees, the same pattern of reactions persists essentially unchanged from day to day.	_____	_____
13. A leader should check women conferees' understanding of technical terms in such a way as not to separate them out from the rest of the group and make it noticeable.	_____	_____
14. Failure to extend general participation in Step I sufficiently to clarify terms and technicalities in the minds of women conferees may make them appear to lack perception later in the discussion.	_____	_____
15. The presence of women conferees does not require any change in the fundamental handling of the steps in the General Conference Process but calls for the usual adjustment of methods to meet the needs of individual conferees.	_____	_____
16. Women as a general rule do not have as natural and freely expressed a tendency toward exploratory discussion as men.	_____	_____
17. The woman conference leader must keep in mind the male preference for factual reasoning.	_____	_____
18. The conference method works in the favor of the woman conference leader when conducting a male group.	_____	_____
19. Closely shaped handling which permits only such overhead as is necessary to give the group a sense of control is the wisest practice for a woman leader.	_____	_____
20. Clear definition of the subject through a good Step I eliminates any tendency automatically to ascribe to the woman leader's handling a feeling of uncertainty in the minds of the group.	_____	_____
21. The woman leader does not need to avoid giving an impression of forcing group acceptance.	_____	_____
22. In handling a discussion a woman leader should always defer to male authorities in the group.	_____	_____

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	True	False
23. The presence of women conferees changes fundamental leadership rules and does not merely call for adjusting the emphasis placed on variations in their use.	_____	_____
24. Once a woman leader has demonstrated her ability the great majority of men will cooperate.	_____	_____
25. Tolerance, understanding, and a sincere liking for people are essential requirements of all leaders regardless of sex.	_____	_____

Answers: 1T, 2T, 3T, 4F, 5F, 6T, 7T, 8F, 9T, 10T, 11F, 12T, 13T, 14T, 15T, 16T, 17F, 18T, 19T, 20T, 21F, 22F, 23F, 24T, 25T

CHAPTER XVIII

SOME DO'S AND DON'TS FOR THE LEADER

THE UNDERSTANDING WHICH COMES WITH EXPERIENCE IN LEADERSHIP

There is no substitute for actual experience in conference leading for only through the conscious application of the methods and principles we have discussed do their real significance and meaning become apparent to the leader. Nevertheless, before undertaking his practice sessions in a leader training conference or conducting day-to-day business conferences, the leader must gain a thorough knowledge of the methods and principles upon which a sound leadership technique can be built. As has been pointed out, it is through his knowledge of the necessary techniques that he can confidently and successfully carry on until he has developed his own personal leadership technique.

Although the preceding chapters of this book cover all the essentials of conference leading, a number of the finishing touches to perfecting a rounded leadership technique have been reserved and included in this final chapter as Do's and Don'ts for the leader. It is suggested that the individual leader review them after his first two or three practice leading sessions or following his first few actual experiences in conducting day-to-day business conferences or training conferences. Also, the key leader conducting leader training conferences will do well to withhold discussion of these particular items until opportunities arise during the practice sessions to introduce them in a natural way as part of the constructive discussion of the leading trials. Experience has shown that certain of the rounding out and polishing ideas tend to confuse the assimilation of the basic fundamentals if they are introduced before the firsthand knowledge gained through the actual leading of conferences has been achieved. Because of their nature, the subjects discussed in this chapter do not form a smooth-flowing connected discourse but should be considered as complete within themselves.

DISCUSSION PIVOT POINTS AND THEIR IMPORTANCE

As the leader gains experience in shaping, guiding, and controlling the discussion, he will become keenly aware of the existence of pivot points. The leader is constantly evaluating all contributions by individual group members from the standpoint of their relation to the subject under discussion. In addition to determining whether they are directly, closely, or slightly related, or unrelated to the subject, he soon senses definite points at which the trend of the discussion itself changes. Many times the trend of the discussion changes as the result of the leader's answering a question from a group member which requires clarification of a point that has arisen.

By his clarification, the leader either shapes the discussion in the direction which he wishes it to go or away from it. For instance, he may select one of several possible interpretations and in so doing, set the path taken by the discussion. As an illustration, let us assume that the major objective or subject under discussion is "Should the boss make it a practice to eat lunch with some of his men?" During the Step I, Approach, of the over-all discussion, a group member might ask the leader "What is the nature of the existing relationship between the boss and his men?" In his reply the leader can direct the discussion along definite lines, depending upon his answer. If he answers "Let us assume that there is a good relationship," he automatically rules out consideration of cases involving a poor relationship between the boss and his men. Through this single answer the leader shaped the discussion the way he wished it to go.

Failure to catch pivot points can cause a discussion to become confused when the group attempts to explore one or more angles of it at the same time. Occasionally a leader will be unable to evaluate clearly a pivot point or to catch it just when it occurs and a short time later will find that the discussion is becoming confused or that he has turned it in the wrong direction. This is not particularly serious so long as the leader becomes aware of it within a reasonable amount of time and takes action to get it back in the proper channel. In fact it is sometimes a source of inward amusement to the leader when he finds that, through his own option, he has sent the group down the wrong road and,

as a result, made it necessary for him to shape the discussion back without making too abrupt a change. The leader who deliberately overlooks a pivot point and allows the discussion to attempt to continue along two or more lines at the same time has committed a distinct error in leadership, because it is the duty of the leader to evaluate the discussion at all times.

There are many types and variations in pivot points and any attempt to cover them all would be futile since they are usually intimately tied in with a particular discussion. A leader will, almost without exception, soon learn to recognize them and to take action upon them without any delay other than that which may occasionally be necessary to clarify and define them so that deliberate action may be taken. It should be clearly understood that they do not always appear as questions asked of the leader but may be part of contributions made by individual group members or appear during overhead discussions. It is particularly important that pivot points appearing in Step I, Approach, be recognized and properly handled since this step defines the discussion and its limits.

DISCUSSION GUIDANCE AND EFFECTIVE BOARD WORK

Observation of the initial attempts of new leaders seldom fails to show a lack of use of the easel in shaping and guiding the discussion. Some leaders may have a tendency to view the easel as a formal tool of a teacher and may hesitate to use it in day-to-day business conferences until its effectiveness and desirability have been proved. This tendency persists even in formal and purely training conferences where board work might be considered to come about more naturally. Apparently the chief reason that we fail to use this excellent tool lies in our intentness upon trying to shape the discussion through the use of a single sense, that of hearing. We do not get the distinct advantages from using two senses instead of one or from the fact that the sense of seeing is the one through which we learn the best. Often it comes as a complete revelation and surprise to new leaders in their practice sessions when the part that effective board work plays in conducting a discussion becomes apparent.

One of the most disastrous omissions in board work is failing to place the statement of the discussion major objective on the

board following its summation in Step I. Unless the group objective, which has been clarified and defined, is on the board where it can be observed and used as a check by the group members as well as the leader, there are many opportunities for the discussion to go astray. In fact continuous restatement of the major objective when it has not been written supplies many varying shades of meaning to it. Of course, in a well-conducted Step I, there may be some preliminary board work prior to the summation and statement of the major objective in its final form; however, this will vary with the specific conference discussion process used.

Clean-cut, effective board work is also highly essential in Step II. As an old experienced educator said many years ago, the quality of a conference leader's or teacher's work is often disclosed by his board work if you review it after he has completed his session. As a general rule, it reflects the orderliness and effectiveness of his thinking processes as well as those taken by the group in response to his guidance. In conference leadership, the material placed on the board can be readily and easily listed in a topical outline form in which the major objective, being the main heading, is listed farthest to the left with the minor objectives indented slightly and the discussion points under them indented slightly beyond. This not only gives the true significance of the items but also indicates to the group without any direct statement the relative significance of them because of their position. The leader should not attempt to cramp his material nor do too much scratching out and correcting unless he rewrites and restates the corrected material.

Although the discussion of a major objective is, as stated, reflected in the topical outline arrangement given the major and minor objectives together with the discussion points and remarks which warrant placing on the board, this does not mean that it must all be included on a single sheet of paper. In fact the whole discussion of the major objective may cover several sheets of paper; for clarity, it is often wise to start the discussion of a minor objective on a new sheet of paper. This, of course, depends somewhat upon the extent of the discussion of each of the minors.

The placing of minor objectives and statements upon the board should be done naturally in conjunction with the flow of discus-

sion and not be allowed to prejudice the discussion nor cramp its freedom. It is a most efficient discussion control device when properly used. The leader must remember that it is subordinate to the discussion but forms the means of consolidating the conclusions as they are made as well as giving the conference a clean-cut picture of what is taking place.

During Step II, as each minor objective is placed on the board and discussed, its very appearance at the correct time tends to keep the discussion in line. Furthermore, it permits the leader, by a mere offhand reference, to refocus the group's attention upon the item under discussion or to allow clear-thinking, logical group members to do it for him. It assists the leader in his conscious clarification of all individual contributions relative to the subject under discussion and the group's subconscious efforts along the same line. Relationships between items are readily apparent when they appear upon the board.

Until they have gained some experience in leadership, few leaders realize the far-reaching effect of merely asking a conferee to state his idea or reaction in words so that the leader may write it on the board. This is a highly effective means of controlling poorly thought out, irrelevant contributions from conferees who may be overtalkative or who may be tending to obstruct the progress of the discussion. Very often the conferee takes time to think over what he has just said in order to phrase it properly; he may forego pushing the point when he says, "Well I just can't seem to word that now," and the leader can go on to other discussions. On the other hand, if the conferee is able to word his contribution so that it can be placed upon the board for consideration, it brings it out clearly so that there is no question as to the point under discussion and proper disposition can be made of it.

The leader also has another very effective means of shaping the discussion through the use of board work as a method of selecting and sorting individual contributions. Although he deliberately but tactfully ignores certain contributions to the discussion, not even considering them for writing on the board, there are other times when leads to minor objectives which he wants to use later in the discussion will appear. In order not to confuse the issue under discussion, he may make a note of the contribution and the individual's name on a pad, which he

keeps on the table, so as to use it later in the discussion. At other times, he may say to the contributor, "That's a good idea. Let's reserve it for discussion later," and write it in the upper or lower right-hand corner of the board. The very act of setting it to one side for future reference relieves the mind of that individual and others in the group interested in it and frees them for a continuance of the discussion of the point at hand, in addition to providing the leader with ammunition for later minor objectives. The leader should never fail to go back and consider points that he says he will, even if it is only to rule them out. In fact, from time to time the leader will find it most effective in clarifying the whole position to put things on the board for discussion which he intends to rule out through the discussion.

There are two ways in which the leader can approach the problem of discussing the minor objectives in Step II. One is to concentrate at the beginning of the Drawing Out period in Step II on getting the minor objectives listed on the board and then go back and discuss each one separately. In such cases, it is often wise to devote a separate page to the statement and discussion of each minor objective unless its scope does not warrant it. In any event, each minor objective and its discussion should be separate and distinct and not confused with the others. The other method is to draw out one minor objective and discuss it to a conclusion and then to proceed to draw out another minor objective and discuss it. Both of these methods accomplish the same over-all objective; however, it is desirable in the case of subjects which have a controversial tinge to get the minor objectives listed before starting the discussion so that the group knows that all phases will be included. The leader can readily shape out of the discussion of one minor objective the material which applies to others. The second method gives the appearance of a smooth, natural flow to the discussion and, of course, can be used to advantage from a developmental conference standpoint.

Step III, Acceptance, requires sufficient board work to make sure that the group understands what it is accepting. There is usually some rephrasing and rewriting of the minor objectives to be done in this connection since the final review may disclose certain relationships between them which were not apparent

when they came up individually in the discussion. It may be necessary at times to telescope one minor objective into another if the two are identical in nature. Upon occasion it may be desirable to rearrange the minor objectives in a final logical sequence as an aid to group acceptance. This should not be confused with the actual summarizing which is accomplished in Step IV, Summation. As we know, Step III accomplishes the securing of group acceptance prior to the formation of the actual summarization of the discussion.

It is essential in Step IV, Summation, that a clean-cut, well-phrased summarizing statement be written on the board stating the final over-all conclusion with respect to the major objective. In some instances, such as when a list of possible actions or rules has been set up, the summation statement may consist of such a phrase as, "These are the rules for use in handling complaints." This has the effect of clearly summarizing a discussion in which the key points have already been listed during Step III as part of obtaining group acceptance. We must not forget that in many cases the inclusion of a definite, clean-cut statement of the conclusion is absolutely necessary since this statement itself makes up the entire conclusion.

As a general rule, board work appears only occasionally in Step V, Association. It does appear, however, when there is need for concrete expression of the tie-in between that major objective and the others in the series or with the company's policies.

During our treatment of the use of the easel and board work in shaping and controlling a discussion, we have, of course, placed a great deal of emphasis upon it. It must be borne in mind, however, that the discussion, not the board work, is the main objective of the conference and boardwork should be matched to requirements and not overdone. Skill in making this adjustment comes with experience and it is seldom that an individual will overdo the board work. One factor that must always be kept in mind in connection with board work is the bad effect of turning one's back on the group and writing during a discussion. It is best to focus the group's attention upon the things that are placed upon the board as they are being placed there. The leader will find it good practice to repeat what he is writing as he writes it, particularly in cases where notes are being

taken. Regardless of this, however, it has the advantage of tying the board work into the discussion vocally.

THE USE OF COMPARATIVE DISCUSSIONS

Comparative discussions are very valuable to the leader both in drawing out sufficient discussion and in helping to shape the discussion. Whenever an impasse is reached, it can often be broken by having the group make a comparison of the advantages and disadvantages of the subject under discussion, desirability versus undesirability, or even a simple comparison between two possible procedures that might be used. The leader should also keep in mind that if he reaches an impasse in discussing the positive side of a question, he can very often inspire the discussion that he wishes and bring out pertinent points by changing over and exploring the negative. At times, a skillful leader will deliberately take a viewpoint opposed to that of the group in order to provoke the discussion and have the group attempt to convince him.

To handle such situations properly and know what to shape out as irrelevant, it is most important that the leader be thoroughly acquainted with the subject under discussion. He does not have to be an authority but he should have enough general knowledge to be able to sense and evaluate the trends and act upon them. Without a knowledge of the subject he is quite likely to miss the pivot points or unwittingly to select the wrong angle of it for discussion or clarification.

Upon occasion, the leader will find it most effective to crystallize an individual's ideas or the group's reactions through the use of suggested similar situations or words for comparison. For instance, if the group was doubtful about the use of the word "strange" in the statement of a minor objective or a conclusion such as "a new employee may make errors because he feels strange in new surroundings," the leader could suggest the word "nervous" and the resulting discussion should definitely define the exact shade of meaning desired. It is always wise to provide sufficient comparative discussion to keep the discussion vital and alive and in the correct channel. It will be found that such a simple device as listing both the advantages and disadvantages of the subject under discussion will do much to keep the discussion on the beam.

SOME ADDITIONAL POINTERS RELATIVE
TO THE USE OF QUESTIONS

In the chapter, *Questions and Their Use in Conference Leading*, we explored the use of the basic types of questions in shaping the discussion. A few additional points should be brought out and certain features that have been previously discussed should be stressed as they relate to the development of a leadership technique through actual practice. It is generally the experience of most key leaders that the initial conference leading attempts of a new leader show a tendency to overlook the relay and reverse questions. This, of course, is due largely to the leader's attempting to take on too much of the load himself instead of keeping the group working to its utmost limit. It is through the group's exploration of the subject under discussion that the facts are brought out, the necessary shifts in zones of knowledge obtained, and group acceptance achieved. Although it is a natural tendency to do so, until he is familiar with conference leading, the leader should make definite attempts not to do too much talking in the sense that he is trying to sell his ideas for, even in the Informational type of conference discussion, the Shaped Developmental handling is most effective.

On those rare occasions when a member of the group attempts to put the leader on the spot or tends to oppose him, the relay question is very effective since it results in the intended arrow for the leader being directed to another member of the group for an answer. This method of treatment holds with respect to items that do not have any personal angles. It usually comes as quite a shock to the group member to find that he has put the wrong man on the spot through his ill-advised attempts at heckling. Of course this must be done with a certain amount of skill and smoothness so that the group member is not really on the spot, for a Zone A man should be selected.

The leader will find the reverse question particularly useful in heading off the loquacious talker or the one who is insisting, perhaps in all sincerity, upon the discussion of things that are not relevant and that are not clearly outlined in his own mind. This is easily achieved merely by asking, "Will you please phrase your thoughts in a brief statement so I can write it on the board?" Almost invariably the group member concerned is

slowed down when he is called upon to put his ideas into written words. Of course, there will be instances where he will be able to do so; in those cases, the item is placed before the group and in the mind of the leader in such a fashion that it can be ruled upon without confusion. Where his ideas are vague and indistinct, the individual will tend to admit inability to phrase it right now and the leader can go on with the discussion quite sure that the individual will either deliberately fail to bring up the irrelevant point again or that he will drop out of the discussion for awhile to try to phrase clearly what he had in mind and then bring it back to the leader's attention in such form that the leader can size it up and deal with it. All of us are no doubt familiar with the individual who really knows what he is talking about but who hesitates to push himself forward and, as a result, asks a question which, when scrutinized, shows that he is really begging to be asked to talk. Sometimes it is surprising to the leader to find that quite often an individual who asked him a question merely wanted to be invited to talk about the thing himself. In such cases the leader should use a reverse question to do the drawing out.

During the time that a leader is obtaining group acceptance in Step III, Acceptance, he will find that the discussion may vary between rather wide limits with respect to its being directly, closely, or slightly related. This is natural because in "getting on board" individuals often have some little phase of the question that they want to be sure is properly related to the conclusion. There is a very simple test that can be used to find out just how vital this minor variation is to the individual and the discussion. As an illustration, the leader can say, "Well, you wouldn't fuss too much with this statement as it is, would you?" This forms a direct test of his acceptance of what has been determined upon; many times it will develop that it was just an unimportant point that the individual wanted cleared up but was not particularly concerned about. If this is not so, this slight test of his willingness to compromise will certainly bring out what he has to say on the subject.

There is one thing in particular that the leader must constantly keep in mind as he formulates and uses his questions during a discussion. There is a definite need for rephrasing, to a slight degree at least, questions asked by individuals in the group

when they are vague, ambiguous, or confusing in nature. In addition, the same treatment must be accorded questions that are asked the leader and that he relays and reverses. In Shaped Developmental and Purely Developmental discussions, he must be careful not to change the intent nor the meaning of the question but merely to clarify it. In the Informational discussion, it is, of course, permissible to change the meaning to some extent if it advances the discussion; however, when a direct contribution of information is required, it is better to do it in a clean-cut manner. This can often be done by inspiring a question from one of the group requesting the leader to supply the information to him. This gives the impression of group rather than leader control, as is the case when he stops the discussion and proceeds to lecture and instruct the group.

The leader must keep in mind at all times that, by a slight rephrasing and clarification of questions, he can shape the discussion in the direction that he wishes it to go since he can quite readily take it from the slightly related to the closely related zone or from the closely related to the directly related zone through such action.

THE MECHANICS OF SPEAKING

Quite often a key leader who is conducting leadership training will find that there is an impression that a conference leader should have some of the qualities of the silver-tongued orator, the preacher, and the glib salesman in his manner of speaking. Nothing is further from the truth, as was pointed out earlier in our study of leadership. Conferences will remain a practical and necessary part of business and industrial activities. They will continue to be conducted by supervisors and executives whose main objective is to achieve group understanding and acceptance rather than to convey and sell the idea of great individual fluency and speaking ability. There are, however, some practical points as to speaking which cannot help being of value to all of us in our leadership work.

From a direct and simple approach, there are really only three styles of speaking. The first might be termed the oratorical or preaching delivery. It is a distinct Type I meeting technique in that it does not invite discussion, participation, or even individual variations in thought. Its main purpose is to appeal

to the emotions and to achieve thought or action along certain specific lines desired by the speaker. At the other extreme, we find the ordinary conversational manner of speaking which is wholly an invitation to discussion, participation, and the expression of individual ideas and reactions. It lacks definite intentions of guidance, shaping, and controlling. All other styles of speaking represent combinations and variations of these two, with one or the other predominating depending upon the objective sought. In the case of conference leadership a third type of speaking is used. It consists of a combination of such elements of the first type as are needed to make sure that the conversational style can be given the direction and control required by the leader without manifesting the Type 1 meeting features of the oratorical style. It can readily be seen that, where the group is concerned, the manner of speaking must have some elements beyond that required in a simple conversation although the chief objectives are the same. There must be some elements of presence and control if the necessary guidance is to result. It is not intended that we investigate or discuss these styles of speaking at any great length but rather that we shall consider a few of the mechanics of speaking that will be of advantage to the leader.

One of the first things a leader must realize is that he must talk at such a level as to command attention. If he does not raise his voice enough to make it carry and override the general conversation or does not give it sufficient force to be distinctly and clearly heard, he will have difficulty with his leadership regardless of how well he knows the principles involved. This does not mean that he must take on the oratorical or preaching style. Rather he should attempt to retain the invitational features of the ordinary conversational tone and manner but give his voice sufficient power to carry and be heard. He must remember that, in a way, he is broadcasting and he must supply sufficient energy to activate the receiving stations, which are the members of the group. There is one way which is certain to make the voice carry and at the same time save effort. It is to pitch the voice a tone below the conversational tone and to talk with the diaphragm rather than merely with the tongue and the oral cavities. This automatically pitches the voice a tone lower than the normal conversational tone and uses certain frequencies

which, when given sufficient power and drive, will enable the leader to talk effortlessly and effectively over long periods of time. As a matter of interest and checkup of what we have said, the leader will find it an interesting experiment to cup both of his hands behind his ears and listen to his own voice. This gives a clear picture of how your voice sounds to others and is often used by singers, speakers, and radio people to check the pitch, tone, and carrying power of the voice. It often comes as quite a surprise to find that everyone can speak in two different ranges, their usual conversational range and a lower range activated by the use of the diaphragm. There are, of course, some people who naturally talk in the lower range at all times. Thus we find that, if we pitch our voice in the lower range and give it the necessary power to carry, at the same time retaining insofar as possible the conversational invitation to discussion, we will have achieved the main requirements.

As we have mentioned before, the leader must be sure to use complete phrases and sentences when he is talking. Failure to do so makes for confusion and garbling which become not only difficult to follow, but extremely tiring to others. There should be a reasonable variation in the emphasis placed on different phrases and words so as to color what is said. This does not need to be done in a self-conscious or artificial manner but should be done as a result of the natural emphasis given by devoting all one's efforts and energies to what he is saying and thinking. A very simple and effective device is to use varying intensities from time to time. Just as effective emphasis can be placed on what is to be given importance by lowering the voice after a period of normal talk as through raising it still higher. It is always desirable to speak naturally and to provide natural breaks in the flow of words since pauses for assimilation of ideas and digestion of thoughts are desirable rather than harmful. It is only the unwarranted pause that is confusing and detrimental to the discussion.

Very few of us in our ordinary day-to-day conversations are conscious of the fact that when speaking to a group, we should, in a sense, tend to throw our voice where we want it. If we are in conversation with someone standing beside us, we tend to talk to them in a tone which is pleasant and which they can hear but not as if we were trying to make someone a block away

from us understand what we are saying. When we are talking to a group, however, we fail to realize that there is a compromise between these two extremes. We should aim our voice according to where we want it to go. The act of aiming will be useless unless we adjust the energy and level to permit it to reach its objective with sufficient energy left so that it can actually be heard and understood without difficulty. The orator or preacher does not expect a return and he drives his voice out without any intention that it shall be picked up and returned. A conference, however, is more like tennis or ping-pong in which the leader and the conferees as well wish to make their voices carry to others with sufficient energy to do the job but not at a level that it will prevent its easy return by the recipient. The leader will find it interesting as well as desirable to aim his voice subconsciously.

There is nothing further from the requirements of a conference leader than the studied eloquence and mannerisms of the orator; however, he needs to have sufficient realization of those things that will give him the necessary shaping qualities in his speaking. Without doubt, the most common fault is that of not adjusting the level or intensity properly so that he may be heard without effort and yet not be loud to the point of tiring the group. The other major factor ties in directly with that thing which we called "presence" in our discussion of the leader's traits. The group likes to feel that the leader has presence and direction when he speaks but they do not want to feel that they are being forced. He should have a confident, pleasing manner of speaking with a complete absence of domination or overbearing qualities.

THE LEADER AND HIS CHAIR

To the uninitiated, the leader's chair would hardly appear to be a source of assistance in shaping and guiding the discussion. Since the leader can convey his impressions to the group in other ways than through his manner of speaking and his use of the easel, he will find that his chair will stand him in good stead as an indicator of what he desires in the way of discussion, in addition to helping him to adjust his own reactions to the discussion.

By the very act of sitting down and showing interest in the group's comments and reactions, he invites overhead discussion

or gives the impression of a willingness to permit discussion whether it be closely shaped or overhead, since the choice rests with him. Whenever he rises, the group instinctively expects him to take over the discussion or exert some influence upon it. In the day-to-day business conference, a leader will often find it effective to get momentarily to his feet when he wishes to influence the direction of the discussion or to state or summarize the major or minor objectives. This is a most natural procedure where the easel is used and the leader rises to write upon it. However, in those day-to-day business conferences which may not use it, he can rise and move about or in other ways direct the group's attention to himself.

The leader should remember that the chair is the only place in which he can really relax; when the discussion is going well, he should make use of it for, as mentioned above, it is conducive to free discussion. Whenever the leader tends to get excited, keyed up, or concerned, he will find it helpful to sit down in his chair and listen to the discussion to determine what is going on in addition to relaxing himself automatically. Remember the old adage of the prize ring that to relax and overcome nervousness, do stomach breathing, which, by the way we have found is also conducive to effortless speaking.

The leader soon learns that his motions and actions can be used to advantage since they give unconscious hints to the group as to his reactions and desires. Many times, the mere act of rising from the chair and picking up the crayon to write on the board will slow down and even end the discussion as the group looks toward the leader. Likewise, when the leader sits down and relaxes, the group automatically gets the impression that the discussion can go on at will.

DERIVING THE MAXIMUM BENEFIT FROM THE USE OF ILLUSTRATIVE EXPERIENCES

As the leader gains facility in the use of his leadership techniques, he will find that illustrative experiences given by both the group and himself will do much more than add interest to the discussion and give it a general stimulation. We have previously mentioned the use of illustrative experiences for the leader as a means for transmitting Zone A information on an

authoritative basis as well as for sowing seeds for use later in the discussion. In addition, illustrative experiences can do much to shape and guide the discussion.

One of the more skillful uses of illustrative experiences is to provide discussion of minor objectives in such a manner as to keep it within the directly and closely related field with respect to the subject. Some leaders find it a little difficult to procure well-rounded drawing out discussions in connection with minor objectives that do not, on the surface, appear to have a great deal of natural group interest. This is often offset through the leader's calling for or inspiring the recitation of an illustrative experience relating to the minor objective by one of the group members and centering the drawing out portion of the discussion about it. After it has been used to draw out the necessary points and the zone shifts achieved, the discussion can readily be shaped into Step III, gaining acceptance of the principles involved followed by summation. At times, the leader may find it desirable to supply the illustrative experience himself on either a direct or hypothetical third-person basis. We must not get the idea, however, that the discussion should be merely a series of illustrative experiences. A good discussion is far from this but a sufficient number of illustrations should be used when necessary to center the discussion about a particular phase of the subject in order to shape it or to provide stimulation. The leader will find it desirable to have an illustrative experience in reserve when he calls upon the group for one so that he may introduce it if they fail to produce one. Illustrative experiences of the third-person hypothetical type do not have to be absolutely bona fide experiences but should be based upon sound facts and colored with the knowledge of experience.

Very often when the discussion reaches an impasse or becomes somewhat confused, an illustrative experience that is specific and that applies the principles under discussion is an indispensable, natural means of shaping and guiding without making it too obvious. In his preparation for a conference, the leader should give definite thought to providing illustrative experiences and should settle upon a number which he can use if and when the need for them becomes evident. This advance thought and preparation do much to ensure the use of illustrative experiences that have a bearing on the subject and that will achieve

the results desired, for the use of a vague, slightly related and poorly tied-in illustrative experience is just as likely to cause the group to veer off on a wrong phase of the discussion as is an improper choice of direction at a pivot point.

VARIATIONS IN THE USE OF THE SPECIFIC CONFERENCE DISCUSSION PROCESSES

Our previous study of the three specific conference discussion processes dealt with them in a direct manner although it was quite evident that the specific conference process used for the various minors would vary and the nature of the over-all discussion of the major objective would be determined by that which predominated. There are, however, a few variations in the use of the specific conference discussion processes which can be brought home to the leader during practice leading sessions or in connection with his first actual leadership experience.

After Step I, Approach, of the over-all conference discussion process accorded the major objective has been completed and the leader guides the discussion on into Step II, Drawing Out, he has a positive test of the effectiveness of his approach since the development of the minor objectives and the discussion accorded them by the group is a definite function of the conceptions gained by the group in Step I. In some cases, it will be found that the tie-in between the statement of the major objective, which is crystallized in the summation of Step I, does not clearly indicate the scope, limits, and nature of the minor objectives desired. With subjects of a somewhat general rather than a specific nature, this is sometimes difficult to achieve and the experienced leader will choose to handle the first minor objective on an Informational discussion basis so as to give the group a clear understanding of the type of minor objectives to be discussed as well as whether the discussion deals with the specific or the general phases of the question. The remainder of the minor objectives can then be developed on either a Purely Developmental or a Shaped Developmental basis depending upon the treatment required. The wise leader will resort to this variation in handling when it becomes evident that the tie-in between the major and the minor objectives is not clear to the group.

One of the most direct indications of a leader's skill is his ability to handle an Informational discussion on a Shaped

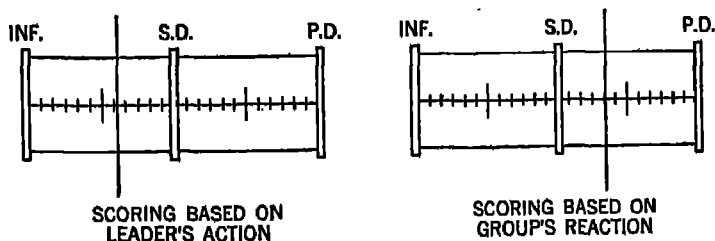
Developmental basis as long as it is going in the direction that he wishes it to go and to resort to a direct Informational treatment only when he has to do so. Even then, the skillful leader will avoid giving the information to the group himself on a direct lecture basis for, if he can inspire a group member to ask him a question so that he can supply the information required on an authoritative basis, the group will feel that the discussion is developmental in nature. Many times, a group will definitely view the discussion as having been of a Shaped Developmental nature in which they set up and determined the conclusion when, from the leader's standpoint, it was Informational. There are few things more intriguing to watch than the skillful handling of an Informational conference discussion in such a way that the group has a definite feeling that it is Shaped Developmental. Of course, there are times when the leader must resort to a clear-cut unmistakable Informational handling. However, this should be avoided whenever possible.

EVALUATION OF THE GROUP'S REACTION AS TO TYPE OF DISCUSSION HELD VERSUS ITS TRUE NATURE FROM THE LEADER'S OBJECTIVE AND STANDPOINT

In the previous section we mentioned the fact that the skillful leader could handle an Informational conference discussion in such a manner that it would give the group a distinct feeling that the discussion was of a Shaped Developmental type. This brings up a most interesting point relative to the difference between the group's reaction as to the nature of the discussion and the actual nature of it from the standpoint of the leader's actions and objectives. In Chap. XIII, Discussion Control and Guidance, we used the chart on the quality of discussion check, Form LT-2, to indicate the nature of the over-all discussion of the major objective from the standpoint of the leader's action. Thus we found that the discussion might fall between Informational and Shaped Developmental or between Shaped Developmental and Purely Developmental instead of on one of the three specific types. This scoring was made with only one thing in view and that was the nature of the discussion as determined from the standpoint of the leader's action. We must remember that the leader's intentions and motives entered into the determination of the type of discussion.

When the group's reaction as to the type of discussion held is charted, it will generally be found that, unless the discussion takes the form of an absolutely clean-cut Informational or Purely Developmental and is unmistakable, the group's feeling will be quite different from the scoring made from the leader's action standpoint. In fact, this factor sometimes confuses the group members during a practice session when the constructive, critical discussion is held and the result scored on Form LT-2 is discussed. They have a feeling, based upon their discussion experience, that the discussion was, for instance, Shaped Developmental slightly on the Purely Developmental side while the check of quality from the leader's action standpoint recorded on Form LT-2 shows distinctly that it was Shaped Developmental with a definite and pronounced tinge of the Informational. With a skillful leader the chart can show that the discussion was slightly over the halfway point between Shaped Developmental and Informational and thus really Informational in nature, while the group's reaction will be that it was Shaped Developmental slightly on the Purely Developmental side.

The key leader will find it prevents confusion during practice leadership sessions to provide a scoring of the group's reactions as to the nature of the discussion in addition to the scoring made on Form LT-2 from the leader's standpoint. An illustration of actual double scoring is shown below. In the case shown, the discussion from the leader's action standpoint was definitely well over toward the Informational with a Shaped Developmental handling while the group was absolutely convinced that they had experienced a Shaped Developmental discussion in which they determined the conclusion. This shows the result of skillful handling of an Informational conference discussion. Care should be taken to chart the group's reaction before informing them as to the scoring based on leader's action on Form LT-2.



DAY-TO-DAY BUSINESS CONFERENCE HINTS

In many impromptu, day-to-day business conferences, the leader will not have the opportunity to use an easel; in some instances it would not be desirable, particularly in a business or industry where it is not as yet a familiar practice. The easel does aid the leader in making sure that group members have a uniform mutual understanding of the major objective as it is clarified in Step I and summarized at the end of it. Furthermore, the discussion of a particular minor objective will be more likely to keep on the beam when there is an accepted statement of it on the easel before the group.

When an easel is not used the leader of a small, informal, and impromptu day-to-day business conference should not hesitate to make full use of pencil and paper even to the point of supplying the group members with them. This enables him to have them get it down so they can see it. He can have the group write the major objective in its final, accepted form at the end of Step I as well as the phrasing of the minor objectives as they are discussed. When Step III, Acceptance, and Step IV, Summation, are reached the same techniques can be resorted to with highly beneficial results.

In practice sessions, key leaders should not fail to conduct at least a few of the practice leading trials on this informal and impromptu conference basis. In many such conferences, the group does not gather around a conference table but occupies chairs in the office of the leader or the member who called the conference. This is an excellent type of conference to introduce into the three-day leadership training program for foremen and first-line supervisors as well as the five-day program for supervisors and officials above the second line of supervision.

As was pointed out in the chapter on leader training programs, small, readily portable and easily used easels should be supplied in business and industries where definite leadership training has been given. Although some conference groups may have a tendency not to use easels where the leader or the group members have not had leadership training, once such training has been given, this feeling is automatically broken down. In the majority of cases, the leader and the group will use easels naturally and

instinctively for they will have been convinced as to the important part they play in conducting a satisfactory discussion.

There is one feature of the day-to-day business conference and meeting conducted by foremen and first-line supervisors which relates to conference planning and leader's outlines. It is the direct use of narrative material by simply underscoring or using an asterisk to indicate the major and minor objectives, conference steps, and key ideas. This, together with brief marginal notes, can be used quite effectively by such leaders whose background and training may not fit them for the more exact methods of preparation.

One of the most prevalent questions in a leadership training conference relates to the participation of the leader as a conferee in day-to-day business conferences. Based on past experience in such conferences, many feel that such participation is unavoidable and perfectly natural. On the other hand, a study of the principles and practices of leadership shows that a satisfactory group discussion must have definite and concrete leadership by one individual if effective, worth-while discussion is to result. From a practical standpoint, however, in the day-to-day business conference, the leader of the group may be the ranking supervisor or official present and also an authority on a particular phase of the business and desires to participate. The skillful leader will, whenever possible, make sure that an associate is present within the group so that he can devote his full attention to handling the discussion. However, when this is not possible, a discussion can be handled with the leader acting in a dual capacity, providing he is careful to show by his manner and his actions when he elects to participate as a conferee. If the leader becomes overconcerned or intent upon his participation as a conferee he is likely to prejudice a discussion or reduce its effectiveness. In the Shaped Developmental or the Purely Developmental, it is wisest for him to refrain from participating as a conferee since the group has the necessary information to reach the conclusions. When the discussion is on the Informational side and he is an authority with a particular interest to support, it is much easier for him to participate as a conferee and maintain his functions as leader since, in the Informational conference, it is only natural for the leader to contribute information directly to the group.

Whenever possible, it is wisest for the leader to set up the conference group in such a manner that it will not be necessary for him to participate to a large degree as a conferee. As mentioned above, this can readily be done by having an associate or a subordinate present as a conferee. However, when it cannot be avoided, dual action as leader and conferee must be achieved through skillful work on the part of the leader. It will be found highly desirable to reduce the periods of participation as conferee to a minimum.

CONCLUSION

In conclusion, we must again point out that during our study of conference leadership we have been considering each of the details at length and may, as a result, have given an unavoidable feeling of complexity to what in the final analysis is a most natural and relatively simple subject. We have been looking at each of the trees in the forest which may cause us to miss the beauty and simplicity of the forest formed by those trees when properly combined. The best plan is to assimilate the material thoroughly, perform the necessary practice leading, make the analyses and comparisons, and then, when actually conducting a conference that has been properly prepared, depend upon our subconscious mind to provide a general guidance. We should avoid attempting to give detailed consideration to each little phase of our leadership technique, for such attention to details will not only lead to an artificiality of manner that is fatal but will also cause us to miss the trends in the discussion that must be caught and used. Remember the disaster that overtook the golfer who, after taking complete lessons on how to drive a golf ball, made the mistake of trying to watch each motion in detail as he actually drove the ball and thus was never able to achieve a smooth-flowing drive. Unification of action comes through practice, it is true, and through mastering the details but, above all, through not watching these very details too closely.

Like any other skill that we achieve, practice is essential if we are to develop it to the highest degree and to maintain it at a reasonable level. Our practice should be as continuous as possible. This is no problem whatsoever in conference leading since many of the principles and methods can be used most naturally in our day-to-day contacts, conversations, and social

as well as business meetings. This gives a real understanding and keeps our knowledge and skill fresh and usable. Shaping, guiding, and controlling fortuitous conversations and discussion which we experience in a continuous stream give as much opportunity for the practical and satisfying use of the principles as is necessary to keep our skill alive for use in our day-to-day business conferences, formal conferences, and training conferences. The use of the basic types of questions is not restricted to our conference sessions but is an inherent part of all of our relations with people; once we understand them we will find that they play a continuing part in all our conversations. In fact, we have always unconsciously used them for we instinctively ask questions that provoke discussion or tend to urge the other participants along toward the achievement of a conclusion. As we pointed out when we started our study, conference leadership is nothing more nor less than an attempt to arrange and use the natural, practical, everyday skills that we experience in our relationship with our fellow human beings.

Finally, don't forget that conferences and conference leading are the most natural of human activities. They are after all merely conscious applications and outlets of the instinctive human desire for conversation and the exchange of ideas and reactions with those about us.

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